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Top 10 Add-ons and Utilities for Lawyers

By Katrina L. Hubbard

INTRODUCTION

When I first approached this topic, I was very overwhelmed at the thought of coming up with just ten software add-ons and utilities. Even after much forethought and research I still felt as though I was drowning.

Therefore, in an effort to save myself and those reading this feature, I came up with criteria that candidates for the top ten had to meet. In doing so, I had to wear two hats — one as a legal technology consultant and one as a user (which I did wear in a previous life).

My criteria:

1. Does other software need to already be installed for the software/utility to function? Does this required software already exist in the law office environment?
2. Ease of installation, use, and the learning curve associated with the software/utility.
3. Cost of the software/utility versus the value it provides.
4. Relevant use of the software/utility for all areas of practice not just one in particular.

Applying this criterion, the following are the Top 10 add-ons and utilities for lawyers.

1. **RPOST REGISTERED EMAIL**

With email becoming the main avenue for communication, tracking, confirming and proving that your email was received is increasingly important — especially when those emails contain time sensitive documents, settlement terms, and other case pertinent information. RPost Registered Email gives you “the power of proof.”

You can easily install RPost into Microsoft Outlook or Outlook Express as a toolbar button. When you need

to send an email that requires confirmation of receipt, simply click the “Send Registered” button versus the send button. RPost then gives you additional options before sending, including compressing attachments into a .zip file, scrubbing the metadata from the attachment, converting the attachment to a PDF, and entering in a reference code (your client's file number perhaps). Once you send the email you will receive an Acknowledgement from RPost and then eventually a Receipt confirming the time and date that your email was received. This receipt serves as verifiable legal proof that the recipient received your email.

RPost Registered Email gives you “the power of proof.” You can easily install it into Microsoft Outlook or Outlook Express as a toolbar button.

Keep in mind this is not the same as the Outlook Read Receipts. As many of you may know the recipient on the other end has to have Outlook for those to work. That is not the case with RPost; you will get a Receipt no matter what the recipient uses for their email client.

Lastly, RPost is more than cost effective. Depending on the number of Registered Emails you purchase, sending a Registered Email can cost as low as \$0.59. When comparing that to sending regular certified mail, this results in a \$4.00 savings. Compare that cost even further to sending time sensitive documents via Fed-Ex, UPS, or USPS. With the reference code, you can even choose to pass the cost of sending the Registered Email off to your client, making this add-on a no brainer.

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Several bar associations endorse RPost and it has received recognition from numerous courts and judges for its effectiveness.

2. METADATA ASSISTANT

In this new era of electronic documents (and electronic discovery), protecting proprietary and confidential information has become a whole new ball game. Many of us have been reluctant to acknowledge that there is even a potential risk or threat, but all it takes is for one breach to occur before hindsight sets in. Thanks to Payne Group and its flagship product, Metadata Assistant, you can easily and effectively start on the path to protecting your documents and their information.

Metadata Assistant analyzes Microsoft Word, Excel, and PowerPoint (version 97 and higher) files to determine the type and amount of metadata (hidden information) that exists. You can then use a variety of options to remove this information. The Metadata Assistant can batch process multiple files located on a local or network folder or any open or closed file. Additionally (and more important), you can analyze/clean files attached to outbound emails and convert them to PDF format.

CompuLaw's main product is CompuLaw Vision, a rules-based calendar and matter management software that tracks important deadlines.

Metadata Assistant comes in two versions. The retail version, which can operate as a standalone utility or run from within Microsoft Word, Excel, PowerPoint, and Outlook (2000 and above), costs \$79.00 (for each workstation to be installed). The enterprise version, recommended for 32 or more licenses, comes with annual maintenance, updates, and the ability to customize.

For \$79.00 and peace of mind, this is one utility a law office should not be without.

3. SCANSOFT PDF CONVERTER PROFESSIONAL 4

With PDF being the most widely used and preferred file type for exchange and collaboration, having a solution that easily converts your documents to PDF is a must for any law office. However, the full version of Adobe Acrobat is not always an option for many offices (I don't think I need to say why).

PDF Converter Professional 4 has everything you need to work with PDFs in one application. You can create, edit, and convert forms, spreadsheets, and documents easily and effectively.

Once installed, toolbar buttons appear in all Microsoft Office applications for quick conversion. PDF Converter Professional 4 also provides markup, comment, and text searching capabilities. There are a few purchasing options depending on your office's size and need, but one license of PDF Converter Professional 4 costs \$99.00.

4. COMPULAW COURT RULES

Ever miss an important deadline with the Court? Of course you have (that's a silly question). This was most likely due to someone (we'll blame it on the Paralegal) who didn't get the scheduling order dates onto your calendar or perhaps the yellow sticky surprisingly fell off the file. Well, if you haven't already heard, a solution to this problem does exist and it's CompuLaw Court Rules.

CompuLaw is the leading provider of court rules generating software. They develop and maintain rules for courts in every state as well as the appellate and federal courts. CompuLaw's main product is CompuLaw Vision, a rules-based calendar and matter management software that tracks important deadlines. Since these rules change frequently, and vary based on jurisdiction, CompuLaw provides subscription update services to enable you to stay on top of the changes. CompuLaw's rules can also integrate with other software applications, such as PracticeMaster and Amicus Attorney.

With the leading cause of malpractice being the failure to properly calendar deadlines, CompuLaw should become a staple in all law offices.

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5. **GOOGLE DOCS & SPREADSHEETS**

Remote access capabilities have changed the way people work and the way offices function. The “mobile” office is becoming increasingly popular and more and more firms now have multiple locations. This can sometimes pose a challenge for the collaboration and sharing of information. Since Google has become everyone’s security blanket, taking advantage of all they have to offer makes good business sense.

If you haven’t already, creating a free Google account opens up a world of services for you and your colleagues. Google Docs & Spreadsheets is a part of a larger suite of Web-based applications offered by Google. When using Google Docs & Spreadsheets, you can either upload or email your documents for access. This then enables those documents to be shared with others in your office, in remote offices, clients, opposing, and co-counsel for real time, collaborative editing. All changes made by authorized contributors will appear instantly for your review. You can also review the history of a document’s revision and go back to prior versions.

Did I mention this basic service is free? It is also a great alternative and solution to other, more expensive/expansive options.

6. **CLIENT CALL TRACKER/MANAGER**

How much time do you spend daily, weekly, or monthly re-creating all the time you spent out of the office on various tasks for clients, such as phone conferences, emails, office conferences, depositions, and court appearances? How much of that time do you think is lost for failure to remember how much time you spent doing those things? Now translate that lost time into lost dollars. How much do you think that is? If you can’t answer these questions or just got really sick to your stomach doing so, then this add-on solution will help.

From Time Technologies comes Client Call Tracker and Client Call Manager. Client Call Tracker automatically tracks all client calls and related activities and wirelessly sends it to any email address for review, modification, and eventually billing. Client Call Manager takes that capability one step further to seamlessly integrate with time and billing software such as Tabs3, Timeslips, and QuickBooks.

Easily installed onto your BlackBerry (Palm and Windows Mobile due out soon), Client Call Tracker or Client Call Manager instantly begins to track the time you spend on calls, emails, or other activities for clients. Then you designate an email address and what time of day to wirelessly send this tracked activity (perhaps to your assistant or billing personnel). This information can then be imported into one of the software packages above or transformed into billing items. If you use Microsoft Outlook, a toolbar is installed that makes the import process even easier.

When using Google Docs & Spreadsheets, you can either upload or email your documents for access.

Having personally used this software on my own BlackBerry for my own business, the amount of time (and money) recovered paid for the cost after two weeks of use.

Client Call Tracker starts at \$24.95 a month, per user, for 1-9 users. Client Call Manager is \$34.95 per month, per user, for 1-9 users. You can do the math or visit www.time-tech-inc.com/calculator.aspx and utilize the revenue recovery calculator.

The ability to not have to re-create your time alone (thereby freeing up more billable time) makes this add-on solution worth the investment.

7. **UNTANGLE**

Have you ever gotten lost, frustrated, or confused with all of the “extra” security services needed such as spam filters, virus protection, firewalls, spyware blockers, pop-up blockers, phishing blockers, and

Web filters? Most of us either assume it’s taken care of or rely on our respective IT providers to take care of it for us. But we never actually delve into what we have, its purpose, or whether or not it is doing its job — not to mention the cost.

The folks at Untangle have recognized this problem and have taken strides to develop an all in one solu-

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tion at a great price. Untangle offers an integrated family of applications that simplify and consolidate the network and security products you need, in one place, at the network gateway. They provide 12 applications (in one), which include spam blocker, spyware blocker, phish blocker, virus blocker, firewall, Web filter (and others), that are open source and free to use with software updates and support.

The Professional Package upgrade adds on live technical support, advanced management features, and a remote access portal. This upgrade starts at \$25 per month for 1-10 workstations. Not bad for a one stop solution to protect your network.

SmartDraw makes creating flow charts, accident reconstructions, crime scene diagrams, timelines, and much more an absolute breeze.

What is even better is the ease of set-up and use, which gives you management and control without having a computer science degree. Untangle is a utility fit for any size law office.

8. MEDICONNECT GLOBAL

Surely everyone's favorite task in a law office is requesting medical records ... NOT! Anyone who has ever been a part of this dreadful and painstaking process knows the pains and pressures associated with this task. It is not just the mundane process of generating all of the requests, but also the follow up work (more like nagging) that has to be done after they are sent out. This coupled with the friendly HIPAA regulations, is enough to make MediConnect Global your office's new best friend.

With a database of over 600,000 physicians and an extremely user friendly online interface, MediConnect has revolutionized the medical records request process. Starting with the actual request, you log into the interface and begin requesting medical records. You can either upload the authorization or fax it after the requests are made. After that, MediConnect takes the reigns. They submit your requests to the provider

and do all of the follow up work thereafter.

With the online interface you can receive real time information on the status of your requests (no more dealing with those courteous medical records folks). As if that wasn't already enough, you then receive your request in an electronic PDF format that is searchable by text (holy smokes Batman)! No more overstuffed red wells and post-it note turned page markers. MediConnect also offers many more add on services, such as bates stamping, indexing, chronological sorting, record reviews, and summaries.

Each request placed is \$29 (plus the cost charged by the provider, which is a standard rate in most states now). However, the time spent alone by your staff preparing and following up on requests (which is mostly unrecoverable) that is then gained to spend on billable work makes the cost/value ratio of this add-on speak for itself.

MediConnect is fully compliant with all HIPAA standards and other government regulations. Their systems run on the most advanced servers, software, and 128-bit encryption methods available. There's no reason not to have MediConnect in your office, if you deal at all with medical records. There's no charge to establish an account, only for the requests placed. Enabling your staff to continue to request medical records manually is just plain cruel (especially if they've read this)!

9. SMARTDRAW LEGAL EDITION

As if preparing for trial wasn't already tedious enough, preparing exhibits and visual aides can turn into a nightmare. Most offices currently rely on an outside source such as an office supply store or graphics company. They may have a fast turn around time, but the price of production will reflect that. With SmartDraw Legal Edition graphics software, you now have options! Currently used by many, including the Department of Justice, SmartDraw makes creating flow charts, accident reconstructions, crime scene diagrams, timelines, and much more an absolute breeze.

You can begin by choosing from over a hundred pre-designed templates and thousands of symbols or you can start from scratch. SmartDraw's point-and-click drawing method makes it easy for anyone to easily

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create professional legal graphics. With your diagrams and charts already designed, printing them is even easier. You can choose to print directly with one of SmartDraw's partners or send the image electronically to your local print shop (in several formats, such as PDF).

One user license of SmartDraw (currently at \$297) should pay for itself with the use in preparing for one trial when you factor in the cost to have such images designed and printed. Not to mention the ability to reuse such designs in the future (versus starting from scratch) and creating a firm library of exhibits.

10. [CONSTANT CONTACT](#)

Even though we often forget, law offices are businesses too, which means that marketing and client development is an important aspect. Although the type and means by which this takes place is different than the mainstream. Since lawyers go to law school to learn how to practice law not run a business, this aspect often falls to the wayside if not addressed at all.

With Constant Contact you can further develop and maintain the relationship you have with your clients by reaching out to them via email. Constant Contact enables you to build and manage permission-based lists of client's email addresses that you can then use to send information to, such as monthly newsletters containing updates about your firm or office, or updates on recently changed laws. You can also send out announcements about your firm, such as new hires or partnerships. Research has shown that clients enjoy receiving such communications from their attorneys, as it fosters trust and a more personal relationship.

Constant Contact is affordable, starting at \$15 per month for up to 500 email addresses. It is also easy to use with an online interface (no software to install). They have a wizard to get you started and you can use several customizable templates or you can create your own from scratch.

CONCLUSION

Hundreds of add-ons and utilities did not make my list. That does not mean that they are not good or effective, just that they are not appropriate for every law office.

To offer a few words of advice, before adding on or using anything, it is always good practice to analyze your current needs. Take stock in what you have already and what that software or service is doing (or not doing) for your office. Doing this will aid in making appropriate and cost effective decisions and ensures that the solution is an appropriate fit.

More importantly, as one of my college professors once said (and words that I have come to live by), when in doubt, don't.

[Publisher's Note: In the process of researching and writing this article, Katrina became so enamored of some of the products she covered that she has since become a reseller. These products include Client Call Tracker/Manager, Mediconnect Global, SmartDraw Legal Edition, and Constant Contact.]

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ABOUT THE AUTHOR

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