

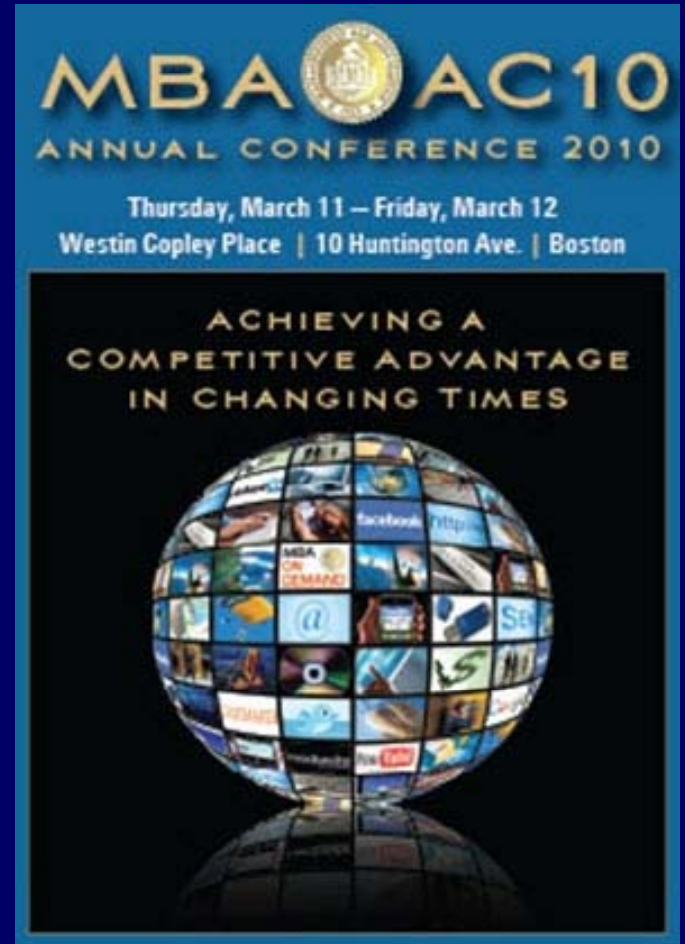
# From Paper to Pixels: The Paper LESS Office Works, Paperless Doesn't

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Presented by:

**Ross L. Kodner, Esq.**  
[rkodner@microlaw.com](mailto:rkodner@microlaw.com)  
[www.microlaw.com](http://www.microlaw.com)  
414.540.9433





## Your Faculty:

**Ross L. Kodner, Esq.**  
CEO/Senior Legal Technologist  
**MicroLaw, Inc.**  
Milwaukee, Wisconsin  
E-Mail: [rkodner@microlaw.com](mailto:rkodner@microlaw.com)  
Web: [www.microlaw.com](http://www.microlaw.com)  
Blog: [www.rossipsa.com](http://www.rossipsa.com)  
Twitter: @rkodner



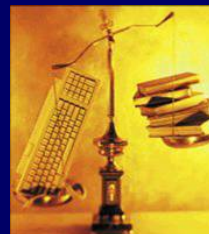
- ♦ Marquette Univ. Law School, 1986 (Law Review)
- ♦ Founded MicroLaw, Inc. in 1985
- ♦ Legal Technologist, Educator, Author
- ♦ Technolawyer Legal Technology Consultant of the Year 1999, Contributor of the Year 2001, 2002, 2005, 2006
- ♦ Over 1400 law offices assisted across North America
- ♦ Frequent author and speaker nationwide on legal technology subjects
- ♦ Chair, Wisconsin Law & Technology Conference 2001-2005, Founder/1<sup>st</sup> Chair, Wisconsin Solo & Small Firm Conference 2006
- ♦ Founder/Chair, National Solo & Small Firm Conference 2006-2007
- ♦ ABA Blawg 100 – Technology Category
- ♦ Chair, Milwaukee Bar Association Technology Committee, 2002-2007
- ♦ Chair, ABA LPM Section Computer & Technology Division and Member, TECHSHOW 1997-2001 Board, Co-Chair, LegalTech CLE Planning Board 1999-2005
- ♦ Co-Author: "How Good Lawyers Survive Bad Times" ([www.tinyurl.com/how-good-lawyers](http://www.tinyurl.com/how-good-lawyers))

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*Download the PDFs of all  
my programs at:*

*[microlaw.com/cle-downloads.html](http://microlaw.com/cle-downloads.html)*



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## “The Ultimate Big Thing” – Do You Know What it is?

- ◆ You may not realize it, but we’ve all been on a quest – a headlong rush to . . . something “BIG” in our practices.
- ◆ Do you know what it is?
- ◆ Hints: It’s not about money. It’s not about happiness. It’s not about satisfying clients.



*No, it's not the World's Largest Frying Pan!*

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## Does this look familiar?

- ◆ Ever stop to think of how much of your life is wasted just looking for paper?



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## Which Lawyer Do You Want to Be?



OR



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## The Fundamental Shift . . .

- ◆ Traditionally, law practices and legal departments have prioritized in this manner:
  - ▶ *Paper file is primary, electronic file is secondary*
- ◆ But in this era of 24x7x365 “instancy” of communications and expectations of collaborative response time, everything is different
- ◆ What this means is that we are shifting to (whether you realize it or not) . . .

## Electronic file primary, paper second

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## Only Way to Succeed – Focus on the “Process”

♦ The only way to make all this work is to focus on the process

- ▶ How do you organize documents?
- ▶ How do you name your documents?
- ▶ Who will scan?
- ▶ When will they scan?

♦ Issues include:

- ▶ How do you handle incoming paper mail?
- ▶ How do you organize email in this process?
- ▶ How do you make sure responsible eyes see all matter-client-related documents?



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## File-Naming Conventions: Are You Consistent? Is it Logical?

♦ Filenames should be applied consistently with the goal being to be able to know what a file contains by merely glancing at a descriptive filename in a list without having to retrieve the file to know what it contains

♦ Here's are two examples of filenaming conventions that have consistently proven themselves:

YYMMDD	DocType	Entity Type	Subject
080530	Ltr	to rehab expert	re: exam results and report

Doc Type	Entity	Subject	Historical Date
Letter	to Robert Jones	re: plea agreement	9-10-07

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## A New Process, A New Concept: A Way to Manage Paper That Actually Works

- ◆ We're going to look at a completely different way of taming the paper monster that conspires to bury us every day
- ◆ And is the key to enabling electronic collaboration



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*Let's See What a  
Paper LESS<sup>TM</sup>  
Law Practice  
Looks Like . . .*

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# The Paper LESS Office™: The Key

Notice that we did NOT say the  
“Paperless” office (the one of  
“myth”). More on this . . .

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This is  
NOT  
About  
Elimi-  
nating  
Paper ...



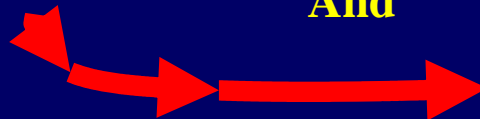
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# Two Important Concepts:

1. Scanning Does **Not** Always Mean OCR

**And**



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2. Scanning Equals **“Digital Paper”**; merely turning physical paper into electronic paper (*Searchable PDF*): which is easier to store, easier to find, easier to share -no more time wasted playing “who hid the client file!”

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# The Process, Step-by-Step

1. We open a file or one is sent to us, usually in paper form. We turn it into “digital paper” using the Paperport (or high- speed) scanning systems. Some clients are already forwarding files in “*digital paper*” form via e-mail - consider PDF as the default file format

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## All Incoming Documents are Scanned with a Desktop or Centralized Scanner



Visioneer’s Paperport scanners pioneered the “distributed” scanning approach. Today use Fujitsu’s ScanSnap S1500, Visioneer’s PT430 , or Xerox’s really quick Documate 252 models on staff (and lawyer) desks

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**And for large stacks of incoming documents, use a high-speed scanner as departmental centralized scanning systems . . .**

*High-speed scanners like those from Canon, Ricoh, Kodak, Panasonic from 30-100 ppm for \$2500+*



**FUJITSU**

*Fujitsu's High-Speed Scanners from about \$1200+ offer 25+ ppm scanning speeds*

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## **2. The Next Step - Document Management is the “Digital Glue” that ties the Paper LESS™ System Together**

**It allows us to open and store documents just as in a paper filing system**

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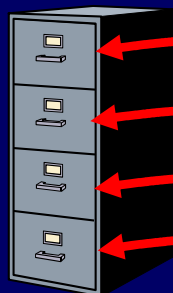


**And just as with a traditional file cabinet, finding any document, for any client, or any “form”, is as easy as walking to your file cabinet and pulling the appropriate paper file**

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**Every client has a drawer in our “Electronic File Cabinet”**



**Safety Insurance**

**Jones Trucking, Inc.**

**Asbestos Litigation**

**Patent/Trademark Files**

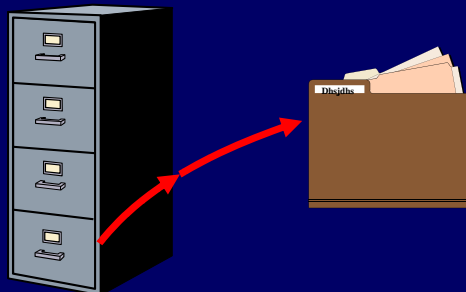
Two DM approaches:

- 1) Dedicated DM such as Worldox, Worksite, eDocs, NetDocuments, etc.
- 2) DM built into case management systems

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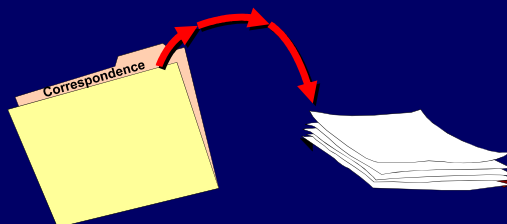
**In the Safety Insurance drawer, we pull the brown expandable file containing the “Sally Smith v. David Jones & Safety Ins.” matter**



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**Inside the brown expandable file for the “Sally Smith” matter we pull out the “Correspondence” manilla folder. Inside are the documents sought**



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# Let's see how our electronic "File Cabinet" appears in the Worldox Document Management System software . . .

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## First we pick the client ("open the client drawer" in the virtual file cabinet)

WORLDQX - Documents: Client Table

Field Help

SELECT CODE FIND + ADD EDIT DELETE ? HELP X CANCEL

Code	Description
ABTS	Abts v. Tegen
ADAMS	Dianne Adams
AFMI	American Family Mutual Insurance
ALLIED	Allied Group Insurance
ALLSTATE	Allstate Insurance
BABCOCK	Beth Babcock
BAO	Bruce Olson Dictation
BISTRIAN	Jackie Bistran
CAPITOL	Capitol Convenience
CASCO	Casco Enterprises, Inc. d/b/a Avenue Art
CIGNA	CIGNA Property and Casualty Insurance Co.

Double-click on the client name listed in the "Client Table"

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**Next we pick the matter (“the brown expandable file” in the “client drawer”)**

WORLDQX - Documents: Matter Table

Field Help

SELECT FIND ADD EDIT DELETE HELP CANCEL

Code	Description
<b>719743</b>	<b>DORSCHNER</b>
9.000	GRE-General Matters
9.001	Alden v. American Heritage Homes
9.002	Helmer v. Tower Insurance Company
9.003	Dorner v. Best Built, Inc.
9.004	Yang Hassel Material Handling
9.006	Ly v. Blue Cross & Blue Shield, et al.
9.007	Baye v. Allouez Catholic Cemeteries
9.01	Champeau v. Hillcrest Homes
9.02	Dorschner v. Kitz & Pfeil Hardware
9.03	Rendfleisch v. Heritage Foods

**Double-click on the matter name listed in the “Matter Table”**

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**Finally, we pick the “library” to view the specific type of document (“the manilla folder” in the “brown expandable folder” for the matter). Inside are all the documents: where you would always expect them to be!**

Library Selection

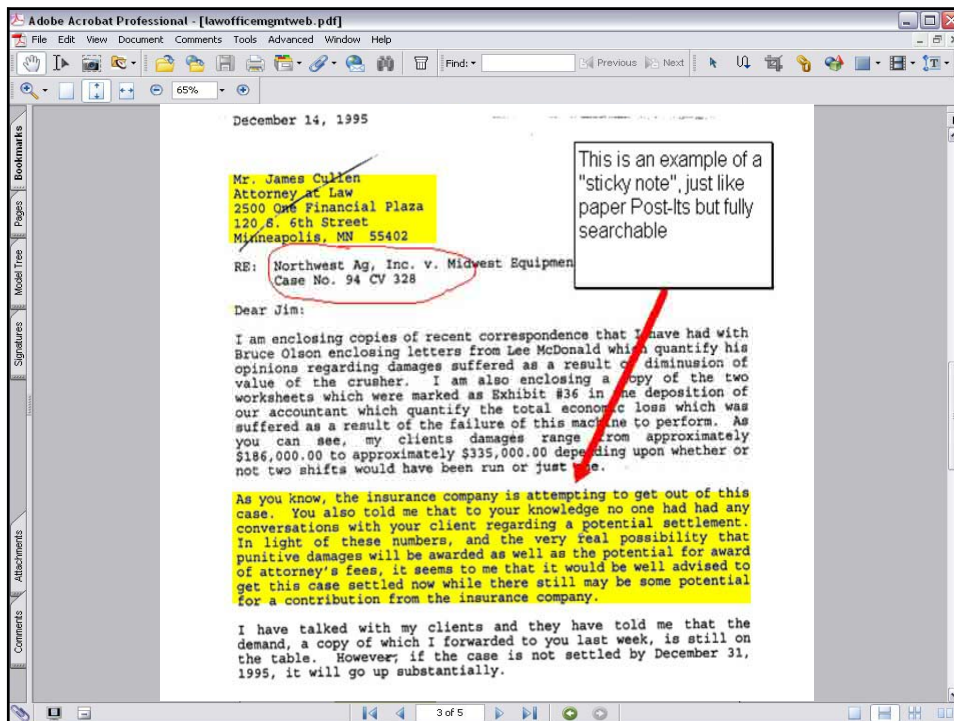
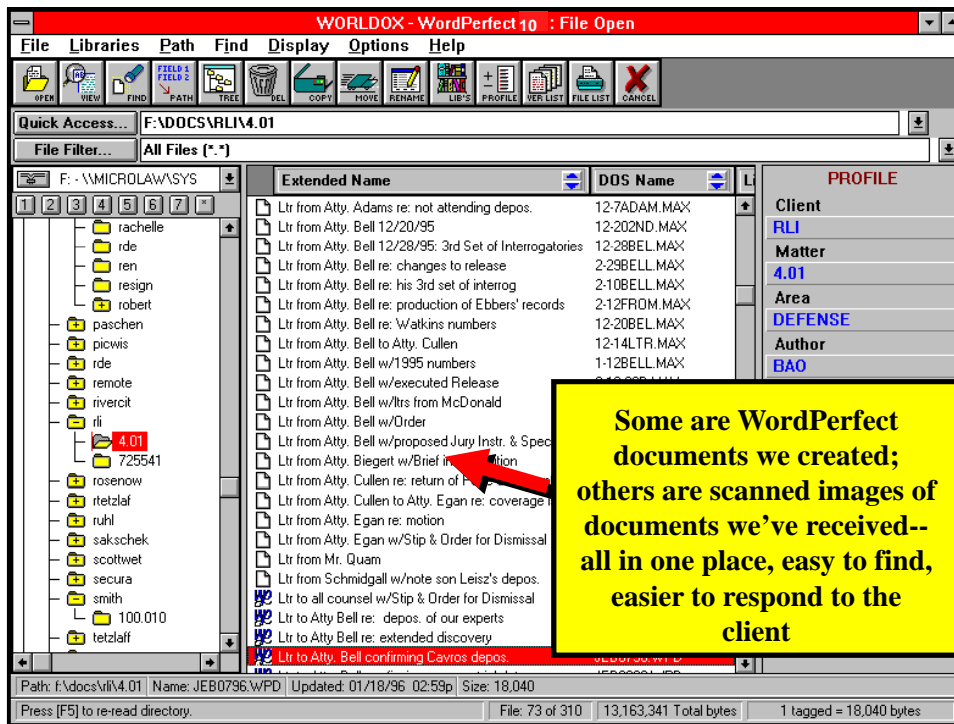
Libraries in F:\DOCS\CLIENTS\VOLSON-BR Files in Library 0

<Files NOT assigned to any Library>

- Briefs
- Correspondence
- Employment Records
- Insurance Documents
- Investigation
- Medical Records
- Pleadings
- Research Notes**
- Training

**Double-click on the library name listed in the “Library/Folder List”**

Find Library [ ] Select Add Delete Assign Files  
Help Rename Cancel Selected 1





### 3. Working the File: The Next Step

Two kinds of physical work product to contend with:

**Internally Generated**  
Docs done with  
WordPerfect or Word,  
Spreadsheets, PDFs, E-  
mails, PowerPoints, etc.

**Externally Received**  
Docs, scanned-to-PDFs  
scanned and OCR'd and  
brought into  
WordPerfect or Word



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**All Documents are Organized by Worldox-**  
**the Virtual “File Cabinet,” making it**  
**impossible to lose anything**  
**and possible to locate all documents in a**  
**flash: even for the terminally messy**

**You have a completely**  
**contiguous electronic**  
**client file - no longer split**  
**into two places!**



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## Connecting Emails to the Electronic Case File

- ◆ What about email? How do we make it part of our electronic case files?
- ◆ *The goal should be to connect all matter-related inbound and outbound emails to your ECF*
- ◆ Worldox tightly integrates with Microsoft Outlook to do this
- ◆ *Let's look at what this looks like*



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## Connecting Emails to the Electronic Case File

The screenshot displays the Microsoft Outlook interface with the Worldox application integrated. The Worldox window shows a list of emails with columns for Description, Date, and Time. A 'Drop Move Confirmation' dialog box is open, showing details for an email titled 'Final paperwork is ready for signature'. The dialog box includes fields for Client (0009 Fifth Avenue Mortgage Corp.), Matter (0040 Mortgage Reference), Doc Type (EMAIL: MS MSG file format E-mail), Sub-Type (NA None), Author (ROCK Rock Newman), and Type (ROCK Rock Newman). The dialog box also has options to 'Move as Profiled' and 'Change Profile'.

Drag and Drop E-mail Profiling  
without leaving Outlook

From P



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**Drag and Drop Emails on the Electronic Matter Folder and Worldox does the rest**

WORLDDOX - Drop Move Confirmation

1 email was dropped on folder: Financial\Fifth Ave Mortgage

Details: Click here to view details

Move to Profile Group: New Jersey Client

Client: 0009 Fifth Avenue Mortgage

Matter: 0040 Mortgage Refinance

Doc Type: EMAIL MS MSG file format: E-

Sub-Type: NA None

Author: ROCK Rock Newman

Typist: ROCK Rock Newman

Options:  Move as Profiled  Change Profile

Don't show again

WORLDDOX automatically profiles the message, using the profile information defined for the target folder.

You are given the opportunity to view the selected profile, and can accept it as is, or change it.

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**What about Outbound Email? Worldox Reminds you to Organize it**

WORLDDOX - Profile Sent Message

To: 'chris@worldox.com'

Subject: WORLDDOX GX Features

Choose Action:

Copy message to WORLDDOX

Move message to WORLDDOX

Add the 'To' address to my ignore list.

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## Transforming Your Practice

- ◆ Generate a Plan! Don't represent yourself *pro se* on your own technology issues!
- ◆ *Review your current file organization and file-naming conventions*
- ◆ Add a document manager – Worldox – to your system (again, no *pro se* winging it, use a pro)
- ◆ *Think through the process – who scans and when, what about the mail handling process?*
- ◆ Commit to training and expect gradual results: emphasize non-traditional, hands-on training
- ◆ *Next step – connect your electronic file cabinets to a practice management system*
- ◆ Avoid technology “Band-Aids”: equipment accumulation does not equal practice changes or give you a competitive edge--only employing a process will!

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## The Electronic Case File and Running Your Law Practice as a Business . . .

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## Cost Justification and the Electronic Case File . . . An Economic No-Brainer!

- ◆ Thinking of technology as an expense is backwards mentality - technology, implemented well, **MAKES MONEY!**
- ◆ What if each of your lawyers were to recover as little as 15 minutes of billable time, per day, every day - the time spent spinning their wheels chasing paper files?
- ◆ What is immediate access to a client's file worth when they're on the phone expecting a "quick case status" (and not having to say "I'll have to get back to you"?)



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## Cost Justification . . . REAL NUMBERS!

### The facts:

- ▶ You save 15 minute a day . . .
- ▶ You bill \$200/hour . . .  
(even if you're mostly flat fee, your time still has the same value, or even more than hourly billers)
- ▶ You can bill/work another \$50 a day (even if you're in-house, of flat-fee or contingent fee billing)
- ▶ That's \$250 a week!
- ▶ That's about \$1000 a month!!
- ▶ ***That's \$12,000 a year!*** Per lawyer!!!
- ▶ In a five lawyer firm, that's ***\$60,000 a year*** in "found" billings!
- ▶ And that's not even considering the impact on staff time!



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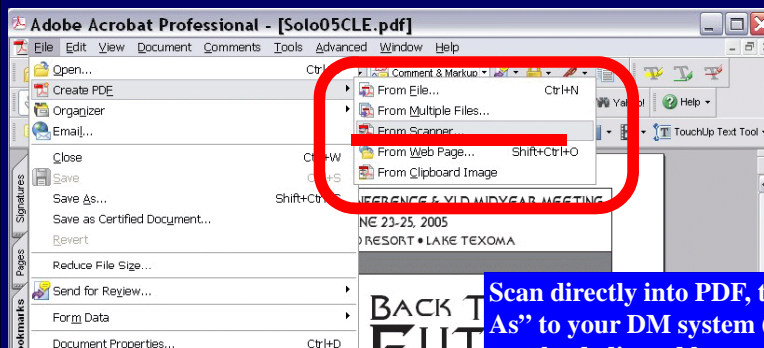
## The Cost of being Paper LESS . . .

- ◆ It can be as simple or elaborate as your budget permits
- ◆ From a “least cost” perspective, one can add as little as a document manager (about \$475 per seat) or the DMS functions inside of case managers like TimeMatters, individual image scanners as little as \$400 per seat and throw in some cost for “the plan” and “the training” and *voila*, you can be Paper LESS™!
- ◆ Of course, this presumes, you have a system structure consisting of the “right stuff” in terms of networking, workstation hardware and application software

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## Getting Scanned Received Documents into Your Document Manager is a Breeze . . .



Scan directly into PDF, then “Save As” to your DM system (Worldox) or use the dedicated buttons in case managers like Time Matters

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## The Paper LESS Lawyer - Not Just for Litigators!

- ◆ The Paper LESS Office process is equally suitable for transactional lawyers as it is for litigators
- ◆ Trusts & Estates lawyers can organize property-related documents
- ◆ Elder lawyers and estate planners can organize financial documents, tax information, etc.
- ◆ Corporate lawyers can maintain all corporate records electronically and communicate with corporate officials electronically
- ◆ Bottom line - ALL lawyers should go Paper LESS!

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## The Paper LESS Office at Age 15

- ◆ Lawyer “multi-tasking” on client files is greatly facilitated - innate increase in client service
- ◆ Document drafting time reduced due to absence of paper markups - recycling older work product is much easier for the lawyer - shift of some primary document generation to the lawyer and “finishing” work to the staffer
- ◆ Trial prep changes for any litigation part of your practice – even for will contests - far better sense of where all documents and material information are located
- ◆ “Work away” and “collaborative” capability dramatically changed with full access to entire case file from anywhere--home, on the road, etc.

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## The Paper LESS Office at Age 16 (cont.)

- ◆ Enhanced ability of working with experts and co-counsel; ability to e-mail electronic versions of entire case files and not have to send or FedEx paper files
- ◆ Staff Perspective - they prefer the electronic file approach so they only have to file papers once and it doesn't get lost since it rarely leaves the file; they can always find the file since it's on the system; and the ability of staff to telecommute if needed as well

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### The Plan

- ◆ Use readily available PC hardware and software, integrate it and maximize the human resources and intellectual capital to the maximum degree
- ◆ The beauty of the concept is that it IS just a concept - a blend of the most common, and least costly, “canned” software applications
- ◆ The mix of canned applications = more than the sum of the parts - this is not some “pie in the sky” megabuck solution only affordable by a few large firms . . .

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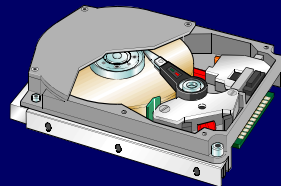


## So How Much Space do All These Images Require?

◆ Scanned images used to take up an **ENORMOUS** amount of hard drive space

...  
◆ Today, scanning software uses all sorts of ultra-sophisticated compression techniques so it's a virtual non-issue today

◆ Even if you were tight on hard drive storage space, it still is FAR more economical today to just add more hard drive space than to take even a MOMENT of human time to cull through your documents and try and delete or archive files to reclaim space



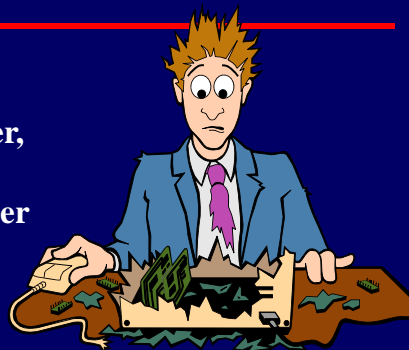
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## Do We Really Need a Document Manager? Can't We Do This With Windows Explorer?

◆ Um . . . sure . . . but think about this...

◆ Do you REALLY want your partner, the one whose VCR at home flashes "12:00, 12:00" to spend half of his/her day in the single most potentially destructive Windows utility of all time?



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## Work Any Time, Any Place . . .

The busy lawyer or staffer can telecommute from anywhere to dial into the office network (from anywhere, anytime) to access client files, calendars, read and reply to e-mail.

WORLD0X - Documents: Matter Table

Field	Help
SELECT	CODE
PRINT	ADD
EDIT	DELETE
HELP	CANCEL

Code	Description
719743	DORSCHNER
9.000	GRE- General Matters
9.001	Alden v. American Heritage
9.002	Helmer v. Tower Insurance Company
9.003	Dorner v. Best Built, Inc.
9.004	Yang v. Hassel Material Handling
9.006	Ly v. Blue Cross & Blue Shield, et al.
9.007	Baye v. Allouez Catholic Cemetery
9.01	Champeau v. Hillcrest Homes
9.02	Dorschner v. Kitz & Pfeil Hardware
9.03	Rendfleisch v. Heritage Foods



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# Now Go Out and Get Paper LESS™ And Banish Those Piles!

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**For help building complete  
electronic case files . . . I'm  
happy to help!**



**Ross Kodner**  
**President and CEO**  
**MicroLaw, Inc.**

*Automating Lawyers Everywhere Since 1985*

**Voice:** 414-540-9433

**E-Mail:** [rkodner@microlaw.com](mailto:rkodner@microlaw.com)

**Blawg:** [www.rossipsa.com](http://www.rossipsa.com)

**Twitter:** [rkodner](https://twitter.com/rkodner)

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