Tag, You’re It!
Calls, Voice Mail and Practice Management

Presenters:
Andrew Z. Adkins III
David L. Masters, Esq.
Agenda

• Introductions
• The Love-Hate Relationship with Technology
• Just When You Think You’ve Got It
• Is There a Silver Lining?
• What’s on the Horizon?
Andrew Z. Adkins III

- University of Florida Levin College of Law (1997)
  - Director, Legal Technology Institute (1997)
  - Adjunct Professor, Law Practice Management (2001)
  - Associate Director, Technology Services (2003-2007)
  - Executive Director, ICAIR (1998 – present)
- Legal Technology Consultant (1989)
  - More than 325 consultations with Law Firms, Law Departments, Judiciary, Legal Verticals
- Author
  - Three Years, Eleven Months, 29 Days (2009)
  - You Can’t Get Much Closer Than This (2005)
  - The KM Study, The ASP Study, The Internet Study
  - More than 200 articles published on legal technology
- Chair ABA TECHSHOW 2000, 2001
- Co-Chair, LegalTech Conferences 2001 – 2007
- adkins@law.ufl.edu | 352-273-0765
David L. Masters

Lawyer: small firm lawyer; small firm general practice lawyer; small-firm small-town general practice lawyer; small-firm rural small-town general practice lawyer; high-tech country lawyer

The Productivity “Smile”

Productivity

0% 100%

Time of Day 9:00 5:00

“We” Control Interruptions

“They” Control Interruptions

“We” Control Interruptions
What Kinds of Interruptions?

• Phone Calls
• E-mails
• People
  – Attorneys
  – Staff
Voice Mail: Love or Hate?

• Audience Survey:
  – Generally
    • “I like voice mail”
  – Interruptions
    • “I tell my secretary to take a message or send to voice mail”
    • “I can look at the Caller ID and let it go to voice mail”
  – Convenience
    • “I can check voice mail at my convenience”
  – Productivity
    • “I’m more productive with voice mail”
    • “I’d like to get notified via email of a voice mail message”
E-Mail: Love or Hate?

• Audience Survey
  – Generally
    • “I like e-mail”
  – Attachments
    • “Need ‘em”
    • “I have problems with e-mail attachments”
  – Interruptions
    • “I don’t know how to turn off the ‘Notify’ feature”
  – Convenience
    • “Who’s? Mine or yours?”
  – Productivity
    • “E-mail makes me more productive”
V-mail – E-Mail: Combined

• We are the “Microwave Generation”
  – “Just calling to see if you’ve received my email.”

• Portability
  – With a Smart Phone, E-mail notifies you of a voice mail message
Phone Tag Tips

• Expect to leave a message
  – Leave a “brief, detailed” message
• Respond within 24 hours
• Say whether or not your call needs to be returned
• Know that your message may be saved and stored digitally
E-mail Tips

• Turn off “Notify”
• Learn to use “filters” or “rules”
  – Automatically stored e-mails in folders
• Squash the office “jokes” and other unproductive emails
  – Create an “alias” e-mail address where users can send the joke; users can check at their convenience
• Learn to store collaborative documents and email the link to users
  – Saves on storage space, multiple copies of the same version
Client Communication Tips

• Set Client Expectations Up Front
  – What do they expect?
  – When can you deliver?
  – Don’t tell them you’re available 24x7x365
    • They’ll call you during non-business hours because they know you won’t be busy
“Unified” Communications

Blah, blah, blah, blah, blah, blah, blah

seamless
one login, one address book and
one inbox
“Unified Communications”

- Voice Mail
- Phone System
- VMail Storage
- Unified Messaging
- Exchange Server(s)
- Save to File
- "Alert"
- Speech to Text
- E-mail Alert
- Windows File System
- E-mail
- BlackBerry
- Unified Messaging
- Exchange Server(s)
- VMail Storage
- Phone System
- Voice Mail
Can Practice Management Help Me Avoid Tag?
Related Records

- Note Records (7)
- Note Archive Records (9)
- Phone Records (5)
- Phone Archive Records (35)
- Email Records (357)
- Email Archive Records (556)
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**Subject**

**From**

**To**
In Summary . . .

- Find Your Productive Times and Make Them Work For You
- Set Client Expectations
- Set Office Expectations
- Reduce Interruptions
  - Know you’re going to be interrupted, but control the “available interruption” times
    - Learn to take advantage of the technology
    - Close your door
    - Work in the library (i.e., “hide”)

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Thank You!

Andrew Z. Adkins III
David L. Masters, Esq.