The Florida Law Practice



For Florida Lawyers - By Florida Lawyers

A JOURNAL OF THE GENERAL PRACTICE, SOLO AND SMALL FIRM SECTION

The Florida Bar

Volume XXXV, No. 2 www.gpssf.org Winter 2015

January 23-24 in Orlando: Solo and Small Firm Technology Conference

We've done it this way since I started my practice. Our clients like paper documents. My courtroom techniques have been effective for 30 years; why should I change them now?

It is **never too late** to register for the annual solo and small firm technology conference! <u>Wild, Wild Tech: Getting Down and Dirty with Technology</u> is an exceptional CLE and networking opportunity, and features hands-on training on the newest software and practice management apps, a practice-area luncheon, speed networking and interaction with many of The Florida Bar's leaders and Winter Meeting guests at the Hilton Orlando Lake Buena Vista.

"Wild, Wild Tech: Getting Down & Dirty With Technology" will benefit lawyers and administrators from firms of any size. Earn 10 CLE credits – including two for ethics – while networking with lawyers, judges, law



students and paralegals from all over Florida. Our courses feature hands-on, interactive sessions for guests to experiment with new software, hardware, gadgets and apps that let them get "down and dirty" with the latest tech innovations.

<u>View this video</u> to learn more about the conference and the "freebies" – apps, demos and other giveaways – each conference attendee will receive, and then **register online** today!

You don't want to miss the Friday-night, Western-themed reception for more networking, beverages and line dancing to your favorite country tunes.

CLE CREDITS

Ethics: 2.0 hours

Can't attend the entire conference?

No problem! NEW this year: **pro- rated conference registration**for Winter Meeting attendees who would like to attend one or more of the Friday morning, afternoon or Saturday morning sessions at only \$133 each.



Please bring a new or slightly used t-shirt for donation to an Orlando homeless shelter.

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Message from the Chair

by Teresa Byrd Morgan 2014 - 15 GPSSF Section Chair

You could win a Trail Wagon – TW200 Eight utility vehicle grand prize. Don't forget to bring a generous supply of business cards. Conference guests participate in a practice-area luncheon, speed networking (optional) and interaction with many of The Florida Bar's leaders and Winter Meeting guests. You'll want to put your cards in for numerous giveaways, product discounts and perks provided by the sponsors and exhibitors, including a *UTV valued at more than \$3,000* (must be present to win). Bring your dancin' boots to our Western themed reception on Friday: Line dancers who are on the floor during certain songs will earn extra chances to win the UTV.



Have these words ever come out of your mouth? If so, you don't have to hire a consultant to tell you that you're already way behind the technology learning curve.

The first item on your 2015 "improve our office technology" agenda is attendance at our section's technology conference, Jan. 23 – 24 in Orlando. This conference is designed for you, the solo and small firm practitioner. All sessions are hands-on learning experiences designed to take your use of technology to the next level, whatever that level is for your firm. I urge you not only to attend this conference yourself, but to bring other attorneys and support staff from your firm. We will help you evaluate your current use of technology and determine how you can become more productive and more profitable in 2015.

- Technology will make or break your practice. If you are not the lawyer in your firm who implements technology improvements, you need to designate someone to take a leadership role and act now. Rapid advances in the use of PowerPoint, TrialPad and digital technology in courtroom presentations; increased reliance on electronic discovery; the use of social media for evidence and marketing ... the list goes on and on. Your law practice can't afford to ignore the tools that your competitors already are using.

- Networking is invaluable to your career. If you are flying solo or practicing in a small firm, building and maintaining a strong network of competent, trustworthy colleagues can be the difference between having a mediocre practice and having one that is truly excellent. As a solo practitioner for the past 17 years, I know first-hand how important it is to build and maintain good relationships with other lawyers.

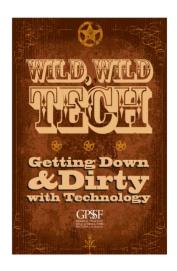
Wild, Wild Tech: Getting Down and Dirty with Technology is the theme for this year's solo and small firm technology conference at the Hilton Orlando Lake Buena Vista during The Florida Bar Winter Meeting. I am actively involved in working on this year's conference, and can assure you that it will be well worth your time and money. This conference features nationally known speakers demonstrating new software, apps and gadgets that can benefit firms of any size — and educating law firms on the most recent

technology improvements. Our section members receive a \$35 discount.

- Lawyers earn 10 CLE credits, including two for ethics. Paralegals can attend for only \$200, approximately half of the non-section-member registration fee. Prorated registration is available at only \$133 per half day for those who can't attend the full conference. View all of the conference materials and register online at GPSSF.org.
- Networking is a key component. A practice-area luncheon, speed networking sessions and interaction with many of The Florida Bar's leaders and Winter Meeting guests at the Friday night reception create a can't miss opportunity to promote your firm and gain referral sources.

I would like to extend a personal invitation for you or a member of your firm to join us in Orlando for an outstanding lineup of presenters and networking opportunities. Numerous giveaways and perks provided by the sponsors and exhibitors make this conference a one-of-a-kind event that will greatly enhance your practice.

I hope to see you there.



PRESENTATION TOPICS

2015 Solo & Small Firm Technology Conference January 23-24, 2015

Sponsored by The Florida Bar General Practice, Solo & Small Firm Section

Practice Management

- **Practice Management Software Can Prevent a Heap of Trouble Chad Burton.** Why solo and small firm practitioners need practice management systems: how PM systems can effectively be integrated into (or replace) your existing software; steps for transition to a new practice management system; what to do if your practice management system goes awry.
- Time and Billing/Practice Management Techniques to Keep Your Business in Apple Pie Order "Shootout" Discussion Presentation by Software Vendors. Software Vendors Best practices for solo and small firm practitioners: evaluate components of existing time and billing systems; identify areas for improvement or replacement; implement changes that improve time and billing management and bring in more money.

How To

- Microsoft Office: The Whole Kit and Kaboodle Adriana Linares and Chad Burton. Word and Excel for solo and small firm practitioners at the intermediate level of experience: handson, detailed explanations of key Office elements that are necessary for use in legal practices; introduction of advanced-level components. (Presentation will focus heavily on intermediate-level components and techniques, but will contain a basic overview of basic and advanced Office elements. Written materials will cover step by step for basic, intermediate and advanced levels.)
- PowerPersuasion: Don't Get Strung Up for Your Next Presentation Craig Ball. Forget every soul killing presentation you've ever seen, and learn an engaging and effective way to persuade visually with PowerPoint. You don't have to be a graphic artist or a technologist to master PowerPersuasion. Veteran trial lawyer and visual persuasion guru Craig Ball will lead you step-by-step through unique and exciting ways you can use plain-ole-PowerPoint to mount compelling presentations. See for yourself why this presentation is consistently one of the highest-rated CLE programs in the U.S.

Technology

- Courtroom Technology to Ride the River With Richard Serpe and Ernest Svenson. Bringing your trial preparation and presentations into the digital age: ways to implement the latest and most reliable technology, apps and tactics—including Casemap, Timeline software & apps, mindmapping, storyboarding, iPad trial display apps (e.g. TrialPad) and other scorchingly effective tools.
- Practicing in a PDF World Without Putting a Spoke in the Wheel John Stewart and Ernest Svenson. Latest PDF techniques and best practices for solo and small firm practitioners: finding the right Adobe fit; ways to successfully navigate PDF evidentiary documents; levels of responsibility for document review and reporting; time allocations for document review; conversion between Word and PDF formats.
- The Jig is Up: Gettin' Wise to the Shakespearean Tragedy of Search in E-Discovery Craig Ball. Keyword search is the gold standard in electronic discovery, but how well does it work? You may be surprised. This program will open your eyes to what you're missing in discovery and reveal the secret pitfalls of electronic search. You'll also learn tips you can apply now to significantly improve the quality of search and lower the cost of e-discovery. Bonus discussion of forms of production as modern as the evidence you seek and produce!

Ethics

- Keeping Law Firms' Social Media Use Right as a Trivet Adrian Dayton. Options and rules for solo and small firm practitioners to use Facebook, LinkedIn, Google+ and other social media tools: how to adhere to Florida Bar advertising rules and ethics counsel opinions; examples of compliant and non-compliant posts; separation of personal and law firm social media pages; latest rules on lawyer blogs and third-party posts. Social media from a personal usage standpoint.
- Scuttlebutt and Ethics in the Courtroom Shawn Vincent. Evidentiary issues with social media and the Internet in litigation: how to subpoena records from Facebook, cell phone companies, etc.; how to combat social media evidence or block its use in the courtroom; how to train associates on research techniques for social media; ethics concerns with social media monitoring. Social media from a courtroom usage standpoint.

Final Presentation

- Full House Tech Tips Before We Skedaddle – Panel of Conference Presenters. Latest and best technology tips and practices for solo and small firm practitioners presented in the conference's traditional "Lightning Round" format: 50 tech tips in 50 minutes.

10 Steps to High Impact Networking

By Kimberly Alford Rice

Networking is one of the foundations of client development (no network = no clients). You can't get business if the right people don't know, trust, and like you. Commit yourself to gradually building a network of the right contacts. Begin by identifying the most likely sources of new business you are trying to develop — your "target audience."

As much as networking is used as a business development tool, few professionals treat it with the attention and follow up it requires to be worthwhile and successful in developing new clients.

To maximize networking events, below are a few tips:

Know Who Will Be There.

Whenever possible, call the

- event sponsor a day ahead to request a copy of the registration list to gather a sense of who will attend the function. Identify 3-5 prospects you would like to meet during the
 - who will attend the function. Identify 3-5 prospects you would like to meet during the event and seek them out. Even better is if you can identify someone you know who will attend the event who already knows the prospect you will seek out. Gaining an introduction is a powerful way to make a connection. Consider posting a LinkedIn search.
- 2. **Prepare for an Event** by doing some online research on prospects' companies and position affiliation to gain a sense of their business/place in organization, etc. The more you know, the better.

Find out as much as possible about the companies' clients, the scope of its business, whether or not the prospect serves in any official roles such as management committee, department chair, etc. This information will also come in handy for introductory conversations. Access LinkedIn, Facebook, Martindale, Law.com, Lexis, etc. for useful information.

- 3. Never Arrive Late. Vince Lombardi said, "If you are 10 minutes early, you are late." When attending a networking event, the most critical time is the half-hour of mingling before and after any planned program -- you can't meet people during the speaker's presentation. Arrive early and make effective use of that time.
- 4. Succinctly Prepare 30-Second Commercial/Introductory Description of Yourself. You are not your job title. Create a verbal picture of yourself in response to the "what do you do?" question.

For example, instead of saying, "I'm a lawyer" it would be more helpful to respond, "I help business owners to protect themselves against employment-related claims." OR "I help minimize risk for privately-held professional services firms." Much more interesting and memorable.

Always Carry Business Cards. This is how people "place" you within an organization. It is also a great way to extend a connection. In an effort to be helpful, you can jot down some useful tidbit of information on the back of your card to hand to a qualified prospect (i.e. name of a needed referral source for their business). To express your accessibility, you may write down your cell number on the back of the card or a web address for something useful to your contact.

At an event, keep business cards handy so you're not fumbling around trying to pull a dog-eared leftover out of an obscure compartment in your wallet. Plan your wardrobe on "event day" to ensure you can effortlessly pull out a card. Don't leave the office without them.

On the other side of this essential networking tool, it is much more important to gather business cards of others than to hand out yours indiscriminately. First, by asking a contact for their card expresses interest on your part to know that person better. Secondly, jotting down a distinguishing note about the contact on the back of their card will help you remember or "place" them for future reference. Third, having a business card of the folks you meet is imperative for follow-up activities. Don't let opportunity slip through your fingers by not gathering business cards of those you meet at networking events.

- Always Wear a Name Tag on the "Right" Side. This is a crucial step because it's the easiest way to make introductions, get noticed and be more approachable. People want to know who you are and what firm you represent. A name tag helps them ask you questions and remember your name later. Be sure to place the name tag on your RIGHT lapel so it is easily visible when shaking hands (not many people consciously do this, but it's important). As women, we must plan ahead regarding wardrobe choices on event day. You will need to either wear a blazer or have some type of lapel for the name tag to clip or pin to.
- 7. **Fly Solo.** Meeting new people is stressful and difficult for many folks. Attending a networking event with a friend or colleague makes it less likely that you will make the effort to meet someone new unless you agree to separate once you've arrived at the event. It is important to step outside your comfort zone by not hanging out with people you already know. To meet up periodically

to make introductions to others is an effective way to use the buddy system. Otherwise, you should go it alone.

- It is better to be Interested than Interesting. Though there are occasions when it is appropriate to be the "life of the party", business networking events is not the place. To take steps to develop new clients, you want to focus in on qualified prospects and learn as much as you can about their business, their challenges, and how you may be able to help them. None of this may be accomplished if you are doing most of the talking. The general rule is that if you are talking more than 10% of the time with a new contact, it is too much and you are not learning. You want to spend your time listening to the other person talk about herself/her company, and concentrating on asking specific, open-ended questions in an effort to learn as much as possible. The focus should be on cultivating a relationship and to create a reason to call or write them to schedule a follow-up meeting or lunch.
- 9. **Exit Strategy.** As a general rule, you should not spend more than 5-7 minutes with each person you meet. Even more reason to be prepared and strategic in your networking approach. Everyone attending is doing the same thing, so it's best to keep moving. Having said that, it can sometimes be awkward separating and moving on. Here are a few tips:
 - Excuse yourself to make a phone call.
 - Excuse yourself to refresh your beverage.
 - Introduce your party to the host or someone you know.
 - Do not excuse yourself to "go to the bathroom."

In his article "Top 100 Tips for Working a Room," Jeffrey Horn suggests an easy strategy to follow may look something like this: "Well, I don't want to take up too much of your time. I am sure you have other people you would like to speak with, as do I. I would like to continue our conversation so let's plan to get together. I'll give you a call next week." Simple and direct.

10. **Follow up. Follow up. Follow up.** This is why you attend networking events – to extend the connection and cultivate meaningful relationships. From your conversations, figure out the best way to follow up with a contact and do so within 3 days after the event.

One of the forms of follow up which deliver "high impact" is with the handwritten note on personal stationery. In the era of quick-and-easy email, a handwritten note packs a punch. The act of taking the time to write a note creates enormous impact, and it's the kind of impact you want to create in your business development efforts and new relationships.

The note does not need to be long but only to iterate how good it was to meet and chat with the individual, and extend the offer to help her in her business in whatever way you can.

The note may be followed up by a phone call or invitation to meet. Be sure to add new connections to your prospect sheet/ contact list.

It is crucial to stay on your prospects' radar and it typically takes 7-10 encounters or "touches" for someone to really remember you for something. (this is a topic for another marketing piece).

Nevertheless, it is important to remember the "WIIFM" rule when you do follow up. This stands for "what's in it for me"? Everyone needs something in their personal and professional life. Hone in on what kind of help a contact needs and find a way to provide it to them, in some small way. You may start simply by passing along the name of someone who can provide a service which they need, like a great financial planner,

for example. You want to make the impression that you are helpful and genuinely care for others.

Reaching to the other end of the spectrum, below are a few things you should never do in networking situations:

- Look over your networking partner's shoulder or around the room as you are speaking to him/her.
- Sit or stand next to friends or colleagues at an event, if at all possible.
- Focus on the food/beverage. Business events are not about the food/drinks, but instead about cultivating relationships.
- Forget or place your business cards in "hard to reach" places.
- Neglect to introduce someone to the person with whom you are presently speaking.
- Hold your beverage in your right hand. When you extend your hand to shake a new acquaintance's, your hand will be cold and wet.
- Complain and/or criticize anything or anyone (host, event planner, your employer, etc.).
- Eat/drink difficult food/ beverages (i.e. garlic, broccoli, spinach, popcorn, coffee, etc.).



Kimberly Alford Rice is Principal/ Chief Strategist of KLA Marketing Associates (klamarketing.net), a business development advisory firm focusing on legal services. As a legal

marketing authority, Kimberly guides law firms and lawyers to develop practical business development and marketing strategies which lead directly to new clients and increased revenue. Additionally, Kimberly provides career management services to lawyers in transition. She may be reached at 609.458.0415 or via email at kimberly@klamarketing.net.

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SCHEDULE OF EVENTS

★ FRIDAY, JANUARY 28 ★

7:45 a.m. - 8:20 a.m.

Registration/Breakfast

8:20 a.m. - 8:30 a.m.

Welcome

Teresa Morgan, General Practice, Solo & Small Firm Section Chair

Introduction

Jennifer R. Kuyrkendall, Conference Chair

8:30 a.m. - 8:50 a.m.

Keynote Speaker:

John Sutton, Miami

8:50 a.m. - 9:40 a.m.

Courtroom Technology to Ride the River With

Richard Serpe, Norfolk, VA

Ernest Svenson, New Orleans, LA

9:40 a.m. - 9:55 a.m.

Networking Break

9:55 a.m. - 10:45 a.m.

The Jig is Up: Gettin' Wise to the Shakespearean Tragedy

of Search in E-Discovery Craig Ball, Austin, TX

10:45 a.m. – 11:35 a.m.

Keeping Law Firms' Social Media Use Right as a Trivet

Ethan Wall, Miami

11:35 a.m. - 1:00 p.m.

Networking Luncheon (included in registration fee)

1:00 p.m. - 2:40 p.m.

Microsoft Office: The Whole Kit and Kaboodle

Adriana Linares, Orlando Chad Burton, Davton, OH

2:40 p.m. - 2:55 p.m.

Networking Break

2:55 p.m. – 3:45 p.m.

PowerPersuasion: Don't Get Strung Up for Your Next

Presentation

Craig Ball, Austin, TX

3:45 p.m. - 4:35 p.m.

Practicing in a PDF World Without Putting a Spoke in

the Wheel

John Stewart, Vero Beach

Ernest Svenson, New Orleans, LA

4:35 p.m. – 5:30 p.m.

Full House Tech Tips Before We Skedaddle

Richard Serpe, Norfolk, VA Ernest Svenson, New Orleans, LA Chad Burton, Dayton, OH Adriana Linares, Orlando

6:45 p.m. - 8:45 p.m.

Reception



7:45 a.m. - 8:30 a.m.

Registration/Breakfast

8:30 a.m. - 8:40 a.m.

Welcome

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Introduction

Jennifer Kuyrkendall, Conference Chair

8:40 a.m. - 9:30 a.m.

Practice Management Software Can Prevent a Heap of Trouble

Chad Burton, Dayton OH

9:30 a.m. - 10:20 a.m.

Scuttlebutt and Ethics in the Courtroom

Shawn Vincent, Orlando

10:20 a.m. - 10:35 a.m.

Networking Break

10:35 a.m. - 12:30 p.m.

Time and Billing/Practice Management Techniques to Keep Your Business in Apple Pie Order – "Shootout" Discussion Presentation by Software Vendors

8



Register me for the Solo & Small Firm Conference – Wild, Wild Tech: Getting Down and Dirty with Technology

ONE LOCATION: (065) HILTON ORLANDO LAKE BUENA VISTA (JANUARY 23 - 24, 2015)

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GENERAL PRACTICE, SOLO & SMALL FIRM SECTION 2014 - 2015 Calendar

Executive Council Meeting
November 7, 2014
One Ocean • Jacksonville Beach

Solo & Small Firm Conference

"Wild, Wild Tech: Getting Down and Dirty with Technology"

January 23-24, 2015

Orlando Hilton Lake Buena Vista

Executive Council Meeting
February 27, 2015
Plantation Inn • Crystal River

Out-of-State-CLE Trip May 27 - June 3, 2015 Alaskan Cruise

Florida Law Update 2015 June 25, 2015 Boca Raton Resort and Club



November 7, 2014 executive council meeting at Jacksonville Beach

The Florida Law Practice LINK is prepared and published by The Florida Bar General Practice, Solo & Small Firm Section.

Teresa Byrd Morgan, Lake City Chair

Damon Glisson, Apollo Beach Chair-elect

Jennifer Dietz, Tampa Secretary

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Ricky Libbert, Tallahassee Section Administrator

Colleen Bellia, Tallahassee Layout

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The Florida Bar Continuing Legal Education Committee and the General Practice, Solo & Small Firm Section present

Cruising Alaska 2015 Out-of-State CLE Trip Environmental and Natural Resources of Alaska 2015 Out-of-State CLE Trip

Course Classification: Intermediate Level

May 27 - June 3, 2015

Anchorage to Vancouver Seven Seas Navigator®

Course No. 1923R

Schedule of Events

Wednerday, 27, 2015

Depart Anchorage (Seward), Alaska

Thurday, May 28

Cruise Hubbard Glacier

friday. May 29

Icy Strait (Hoonah), Alaska

Salurday, May 30

Sitka, Alaska

Sunday, May 31

Prince Rupert, Canda

Monday, June I

9:00 a.m. - 12:00 noon

Welcome

Teresa Byrd Morgan, Chair, General Practice, Solo and Small Firm Section

The Legal Challenges of Defending Alaska's Environment

Victoria Clark, Executive Director, Trustees for Alaska

10:15 a.m. - 10:45 a.m.

Break

Tuesday, June 2

Victoria, Canada

Wednerday, June 3

Vancouver, Canada

About the Speaker

Executive Director Victoria Clark stepped into the role from the Legal Director position in November 2013. Victoria is a graduate of Golden Gate University School of Law, and received certificates in Environmental Law and Public Interest Law. Before joining Trustees for Alaska's staff in 2003, she worked in Santa Barbara, California as a Staff Attorney with the Environmental Defense Center and in private practice representing local environmental non-profit groups. Her work focused on public interest environmental law in the areas of citizen enforcement, especially in the area of water quality, and land use. Vicki received her undergraduate degree in Aquatic Biology from the University of California at Santa Barbara.





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MAY 27, 2015		7 NIGHTS		
DATE	PORT	ARRIVE	DEPART	
May 27	Anchorage (Seward), Alaska	2pm <i>Embark</i>	5pm	
28	Cruise Hubbard Glacier			
29	Icy Strait (Hoonah), Alaska	10am	6pm	
30	Sitka, Alaska	9am	6pm	
31	Prince Rupert, Canada	1pm	9pm	
Jun 1	Cruise the Outside Passage			
2	Victoria, Canada	8am	Mdnt	
3	Vancouver, Canada	8am <i>Debark</i>		

To book your cruise contact:

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Registration

Register me for the Environmental and Natural Resources of Alaska

ONE LOCATION: (287) SEVEN SEAS NAVIGATOR® (MAY 27 - JUNE 3, 2015)

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