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## Technological Fluency, Project Management and Managing Clients

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Seriously, reach out to  
me with questions

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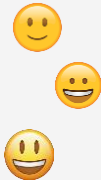
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### Outline

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- Project Management/  
Workflows
- Tech Competency/  
Fluency
- Managing Clients/ The  
Client Perspective



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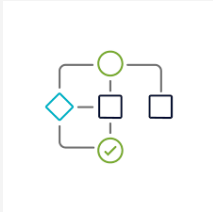
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**Proj. Mgmt. & Workflows**



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**Proj. Mgmt. & Workflows**



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**Proj. Mgmt. & Workflows**



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**Process before**



**Tech**



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**Process before**



**Tech**

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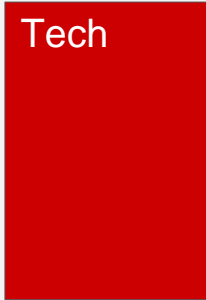
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Process before

Tech



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### Workflow Systems



- Hundreds of options
- Countless books
- Brain Science
- Purpose is:
  - Centralize all tasks
  - Provide tangible accomplishments

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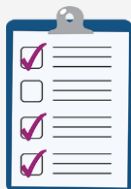
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### Workflow Systems



To Do Lists



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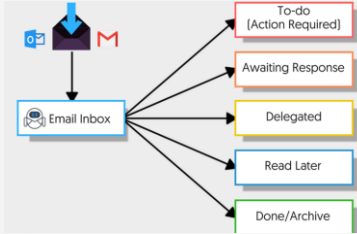
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# Workflow Systems



Inbox Zero




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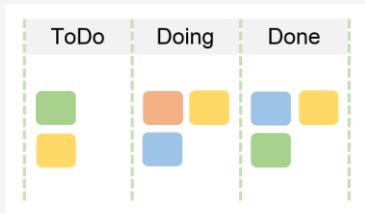
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# Workflow Systems



Kanban




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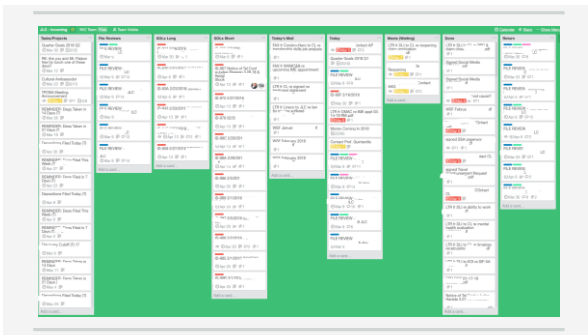
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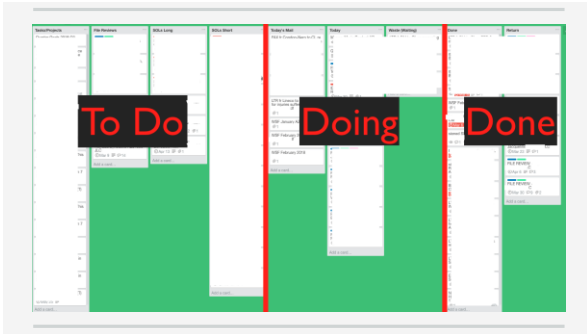
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## Workflow Systems



Eat That Frog



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## Data Data Data



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Tech  
Competency  
& Fluency

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## 2 Purposes



- Being able to understand and advocate for your clients
- Becoming a better more efficient lawyer

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## Understanding



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## Being Better



Automating mundane tasks



Creating whole new delivery systems

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## Simple



Easy Communication

- Text to email
- Fax to email
- Client Portal
- 24/7 receptionists
- Instant messaging
- Video calls

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## Complex




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## Complex



Learn what your workers' compensation case could be worth.

In just 2 easy steps, you can figure out how much you are entitled to receive from your worker's compensation case.

**Step 1**  
What month and year did your injury occur?  
January 2010

**Step 2**  
List your injuries and corresponding rating below:  
List of Injuries  
+ Add a body part

**Get My Results**

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## Explore



Workflow tools



Trello



EchoSign



rocket matter



TASKWORLD



Adobe

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## Explore



Communication tools



slack



calendly



Drift  
Live Chat For Businesses




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## Explore



Data tools



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## Explore



Automation tools



if this then that



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## Managing Clients



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## Managing Clients



The service lawyers sell is not the product clients want to buy.

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## Managing Clients



- Make them feel heard
- Help them define their goal(s)
- Manage expectations

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## Managing Clients



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**Managing Clients**



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Seriously, reach out to me with questions

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Thank you and good luck!  
I'm sure you'll be awesome!

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