



The Paperless Office

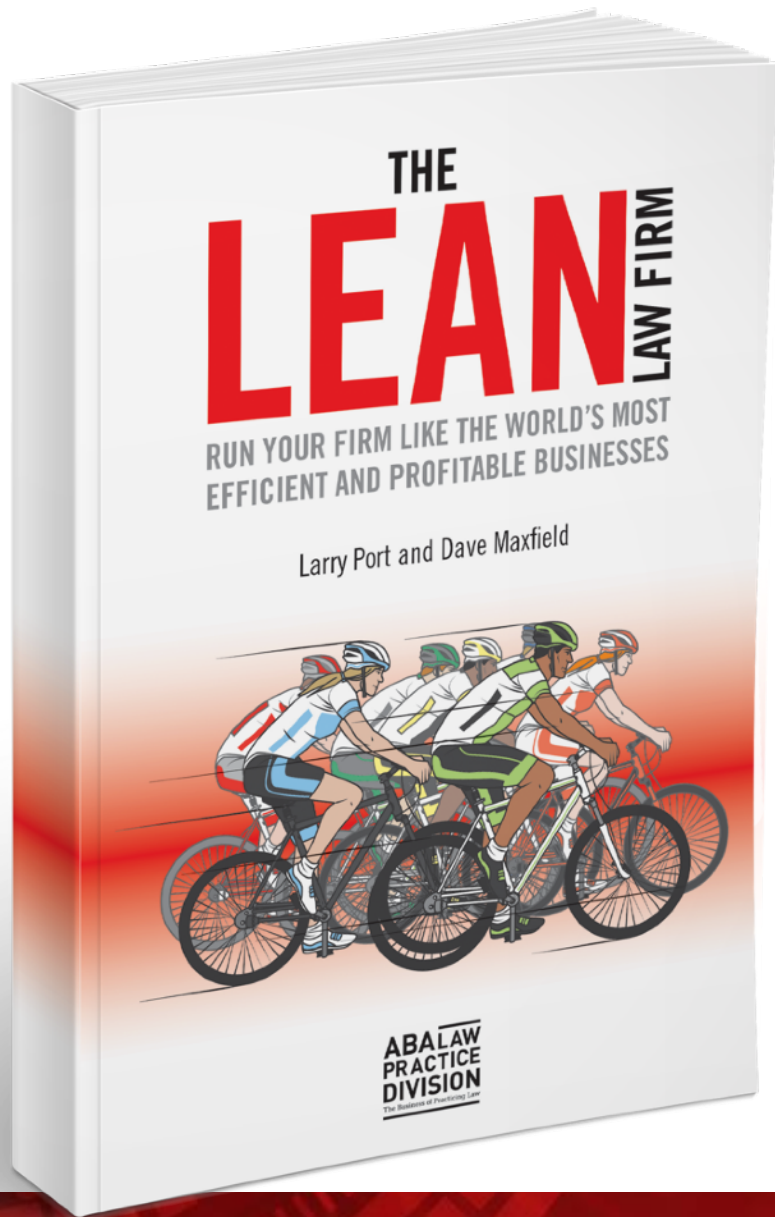
Process, Organization, Adoption

Presenter



Larry Port
Rocket Matter CEO

Husband. Father. Animal-lover. Coder. Software Exec. Author. Little league coach. Fighter of hate. Seeker of wellness.



I Wrote a Book for the ABA

leanlawfirmbook.com

My Podcasts

Apple Podcasts Preview



Larry Port and Dave Maxfield

70 episodes

Join us as we discuss ideas to help legal professionals become system thinkers! In The Lean Law Firm Podcast, legal business innovators Dave Maxfield and Larry Port discuss ideas from their new ABA book on Lean. Each episode covers [more](#)

The Lean Law Firm Podcast

The Lean Law Firm Podcast

Business

★★★★★ 4.7 • 10 Ratings

[Listen on Apple Podcasts ↗](#)



NOV 3, 2020

Ep 70: Lean Law Firm Business Incubator

Larry and Dave talk with David Notowitz, the founder and president of the National Center for Audio and Video Production. David is a successful, multi-millionaire entrepreneur.

[▶ PLAY](#)

SEP 29, 2020

Ep 69- How to Grow Your Law Firm

This week, Larry and Dave discuss how you are acting in your law firm. Are you embracing change?

[▶ PLAY](#)

Apple Podcasts Preview



146 episodes

A legal podcast featuring business, tech, and all things to make law firms more profitable. The 10 Minute Law Firm Podcast is informative, entertaining, and if you find it absolutely horrible, it will be mercifully over soon. Your host is Larry [more](#)

The 10 Minute Law Firm Podcast

Rocket Matter, LLC

Management

★★★★★ 4.7 • 9 Ratings

[Listen on Apple Podcasts ↗](#)

NOV 3, 2020

Ep 118: How Pay-Per-Click Ads Lead To More Clients

This week, Larry Port chats with Zeke Silvani, CRO of Convert IT Marketing, LLC, a digital marketing agency that works exclusively with law firms. Zeke discusses how pay-per-click (PPC) advertising leads into clients and how the digital advertising market has changed and expanded over the years.

[▶ PLAY](#) 11 min

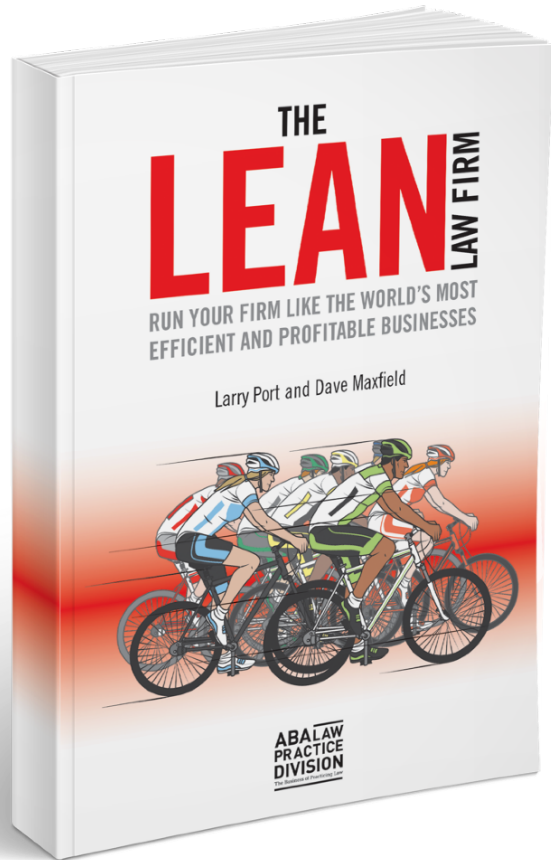
OCT 20, 2020

Ep 117: Streamline Your Document Automation with Woodpecker

This special edition video podcast features special guest Alex Melehy, founder and CEO of Woodpecker. Alex showcases Woodpecker's robust document automation features with a demo. Learn about how he came to the conclusion this product was needed in the market, the challenges he faced, and the success he achieved.

[▶ PLAY](#) 11 min

Going Paperless



“If you’re not running a paperless law office, you’re neck-deep in muda (waste).”

Going Paperless

“I’m a firm believer that there’s no single thing you can do to better improve your law firm than to go paperless.”

Attorney Bryan Sims

More Reasons to Go Paperless If You Weren't Convinced Already...

- Increased efficiency- *i.e. waste less time.*
- Remote access- *i.e. work wherever.*
- Backing up and protecting client data - *i.e. peace of mind*
- No more lost files - *i.e. CYA*
- Stop paying to store paper files - *i.e. more money in your pocket*

Commit to Starting Slowly and Chipping Away

- Make a commitment
- Approach projects with grit and determination
- Overcome resistant employees



Determine Your Process

- How will you handle internally created documents?
- How will you handle externally created documents?
- What will you do with the originals?



Internal Documents

 Pleadings

 Motions

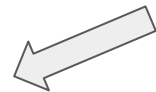
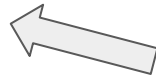
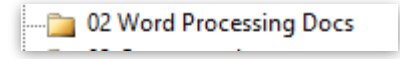
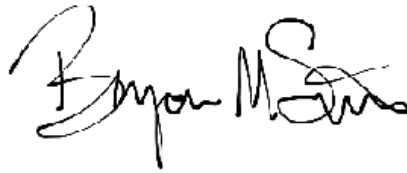
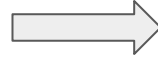
 Briefs

 Letters

 Memos

 Faxes

Internal Document Workflow



netdocuments®

DOCUMENTS WORKSPACES

NAVIGATION









- Rocket Matter
 - Documents
 - Cabinet Inbox
 - Sky Bros - Hobbs Complaint
 - 01 Pleadings
 - 02 Word Processing Docs
 - 03 Correspondence
 - 04 Discovery
 - Depositions
 - Discovery Pleadings
 - 01 Plaintiff
 - 02 Defendant
 - 05 Research
 - 06 Orders
 - 07 Research
 - 08 Notes
 - + Add top-level folder



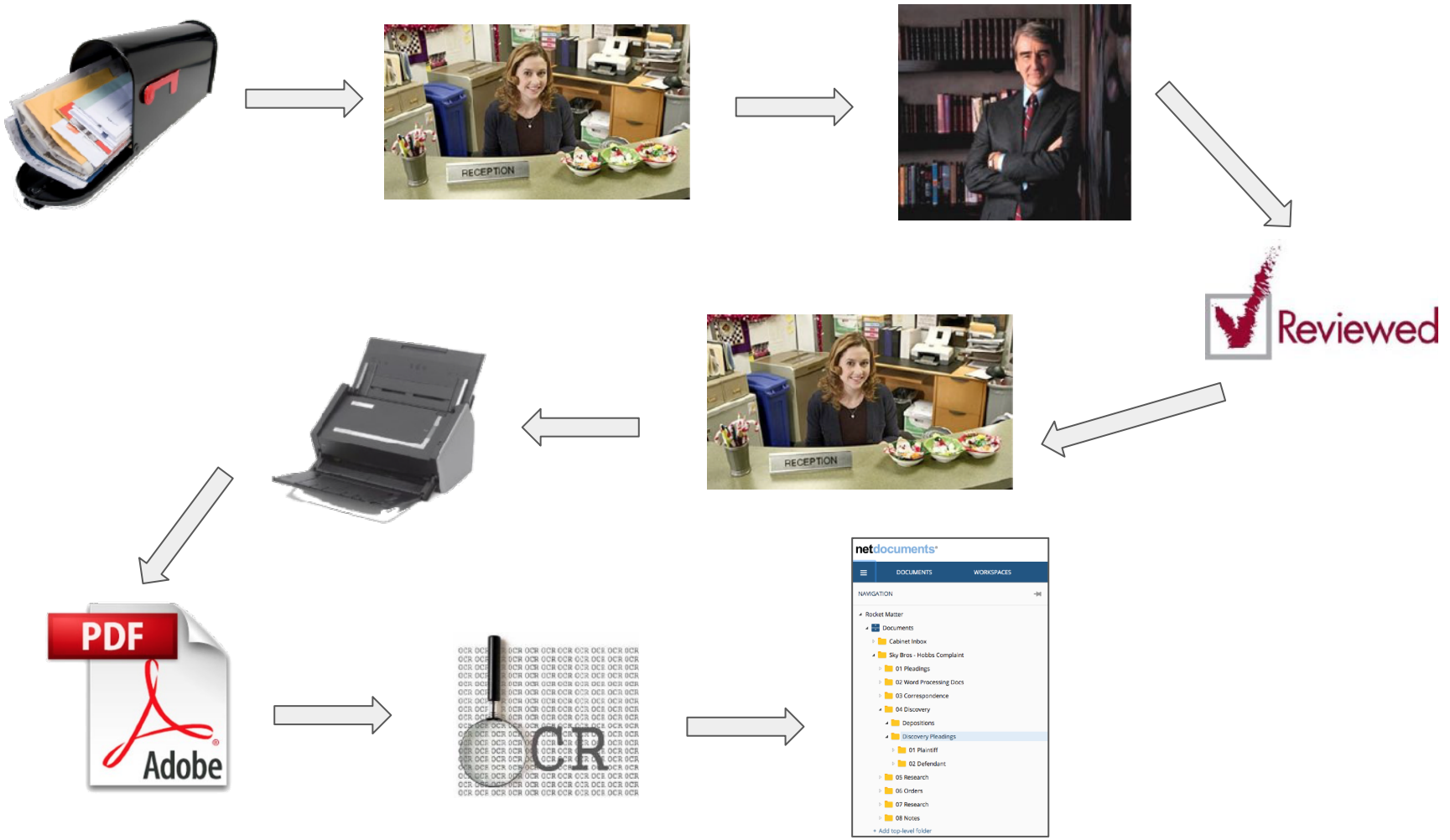
Internal Document Workflow









External Documents

- ✖  Pleadings
- ✖  Motions
- ✖  Briefs
- ✖  Letters
- ✖  Memos
- ✖  Faxes
- ✖  Documents from Clients
- ✖  Documents from the Court

External Document Workflow

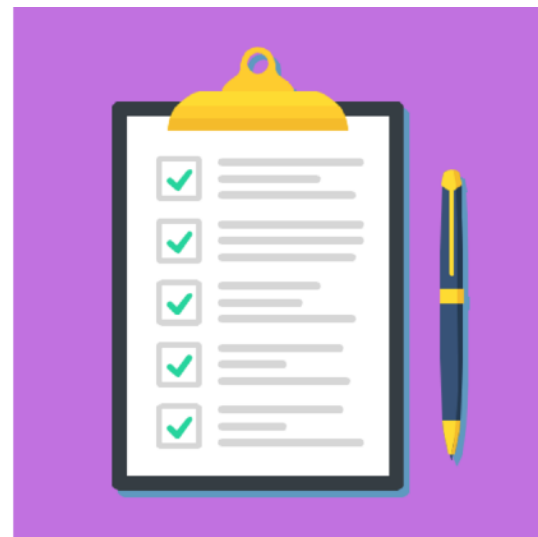


What About the Originals?

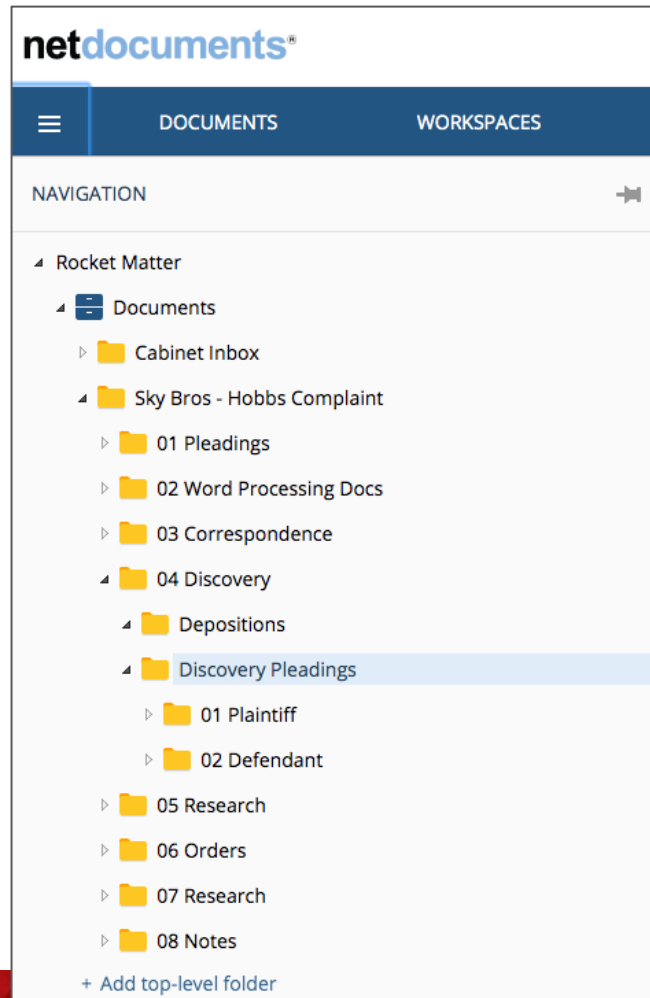
- ✖  Evidence
- ✖  Wills
- ✖  Notes
- ✖  Ancient Documents
- ✖  Forgeries
- ✖  Questioned Documents

Establish Naming and Filing Conventions

- Define an overall folder structure and file naming conventions separately from your overall paperless workflow
- Discuss all ideas with your team



Storage is One Thing, Filing Another



A Word About File Naming Conventions

Letter or Ltr

Memorandum or Memo

2018.01.21 or 19.01.21 or 190121

Do all files have dates?

<http://bit.ly/2MtLz4Z>

Automate Your Billing and Collections

- Combine legal practice management with online payment processing
- This saves a ton of time and allows clients to pay how they want (credit, echeck)
- You'll end up collecting a higher percentage of your invoices



Electronic Invoicing

Jones, Bierko, & Hill


(561) 445-7766

1515 S. Federal Highway, Boca Raton, FL, 33434

Open invoice for Chuck Sheldon Norris

Invoice Date	11/8/2018
Invoice Number	10008
Matter Name	Blue vs White
Status	Payment due
Invoice Charges	\$1400.00
Past Due Charges	\$0.00
Account Balance as of 11/08/2018	\$1400.00
Retainer Due	\$0.00
Total Due	\$1400.00

Payment Information

 128 bit SSL Encryption. You're safe.
Use the form below to pay your invoice.

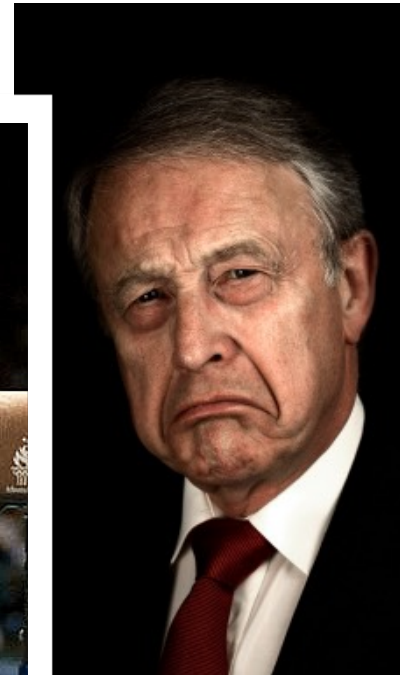
Payment amount

\$1400.00

Credit card

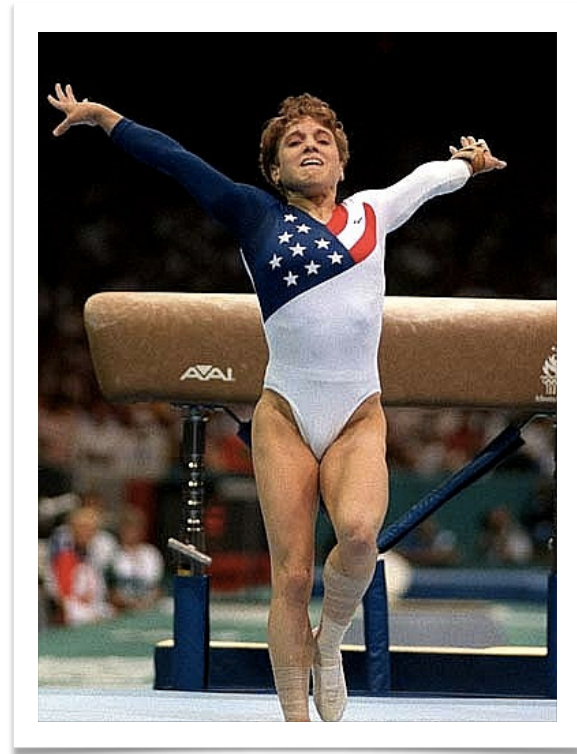
E-Check

Adoption



You'll have detractors, but also champions

You must quickly identify negative change agents and champions.



**You NEED support
from the top.**

**And it's all in the
positioning.**

2021-11-17 Entry
2021-11-17 MEMO re Client
Conversation

You must understand different types of people & know where their interests lie.



Incentivize

Create goals for your team and monetary incentives to spur action and keep everyone accountable:

- \$750 team bonus when naming conventions and processes are documented.
- \$750 team bonus when office converts to an online document storage system.
- \$750 team bonus when invoices are paperless and electronic payments commence.



rocket matter

Thank You!

larry@rocketmatter.com