SMOKEBALL. Florida Bar CLE

The Attorney's Guide to Microsoft Word

Jordan Turk
Attorney & Legal Technology Advisor, Smokeball

Housekeeping

Ask Questions

Ask us questions using the **Q&A** (1)

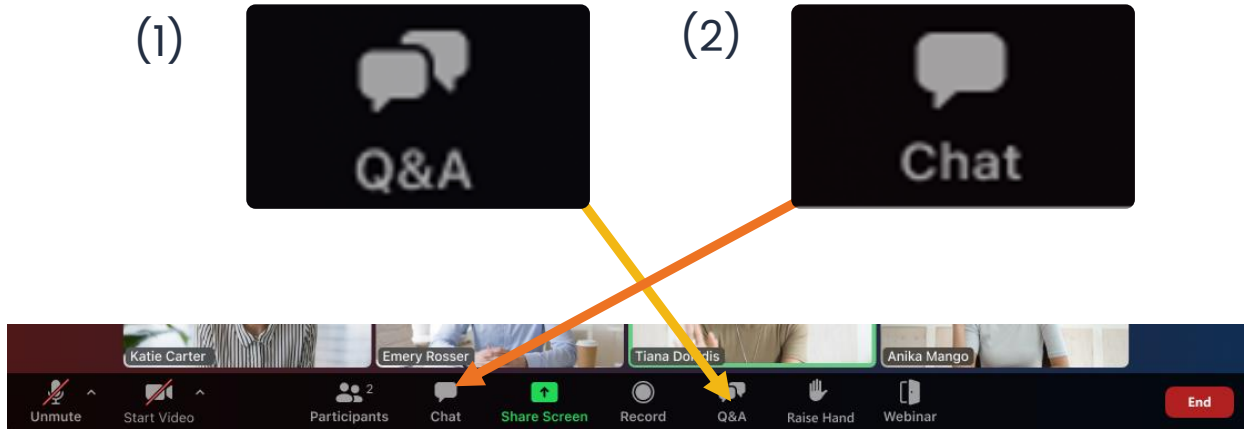
Engage with attendees with **Chat** (2)

Post-webinar Survey

There will be a short post-webinar survey shared at the end of the presentation. We truly appreciate your feedback as it helps us improve our future CLE offerings.

Recording & Slides

Recording and slides will be available after the presentation.



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- JD, University of Arkansas School of Law
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- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success

SMOKEBALL

The #1 Legal Case Management Software for Law Firms

- Automatic time tracking - bill more accurately with a fraction of the effort
- Prebuilt workflows for specific practice areas
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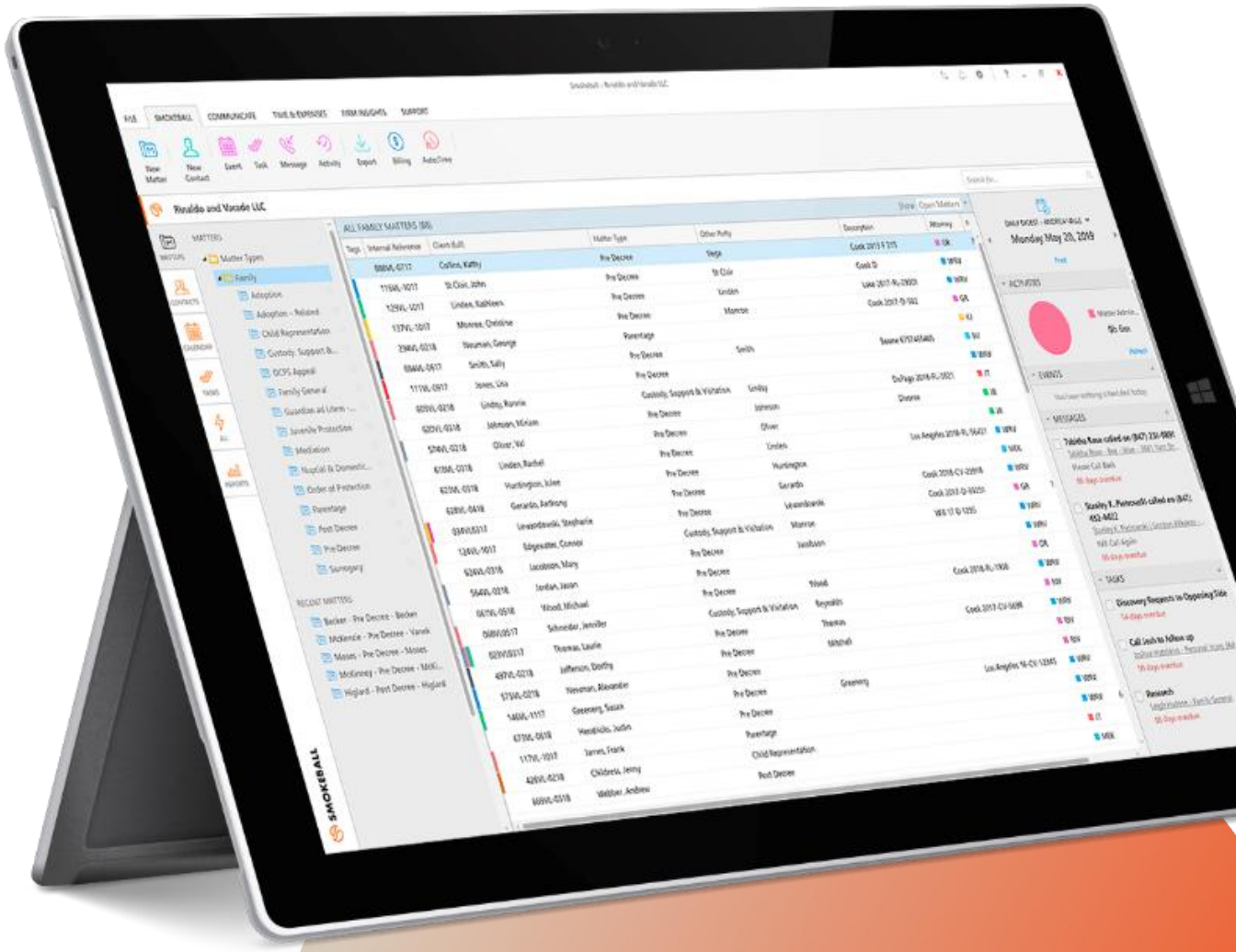

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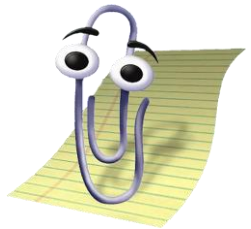
AGENDA

- Part 1: Keyboard Shortcuts
- Part 2: Quick Access Toolbar
- Part 3: Automation
- Part 4: Clipboard
- Part 5: Paste Options
- Part 6: Final Tips

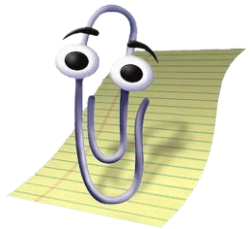


Keyboard Shortcuts

Keyboard Shortcuts

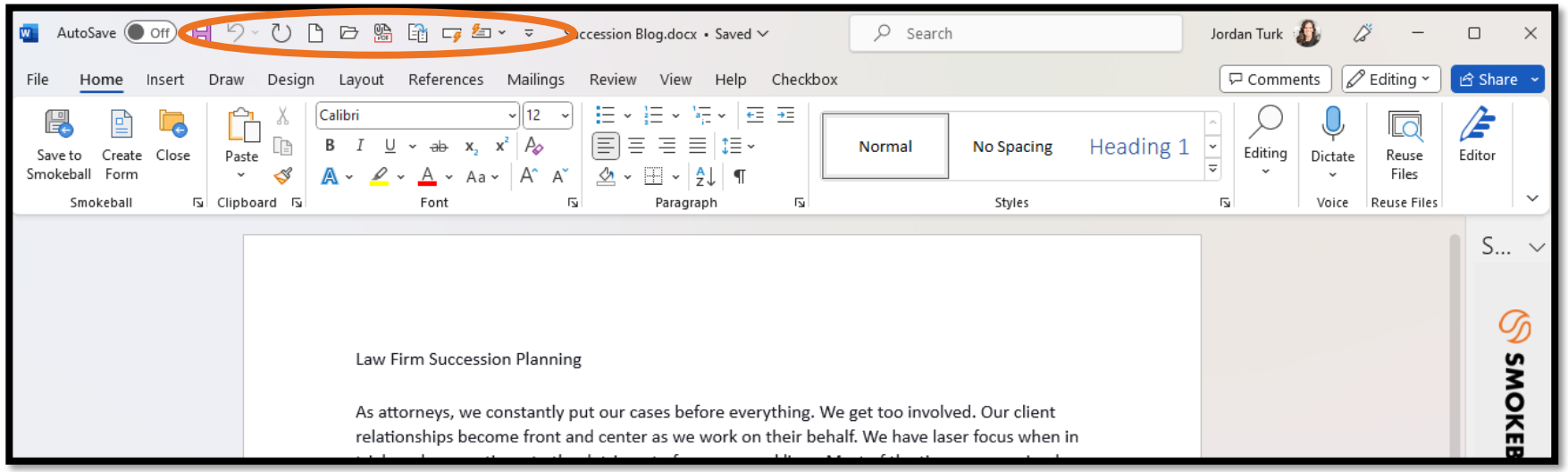
- Cut (CTRL + X), Copy (CTRL + C), and Paste (CTRL + V)
- CTRL + Z (undo)
- CTRL + N (new document)
- CTRL + Home/End
- CTRL + Click (highlights entire sentence)
- CTRL + Triple Click (highlights entire paragraph)
- CTRL + A (highlights everything)

Get comfortable with these! The less you need to use your mouse, the better.

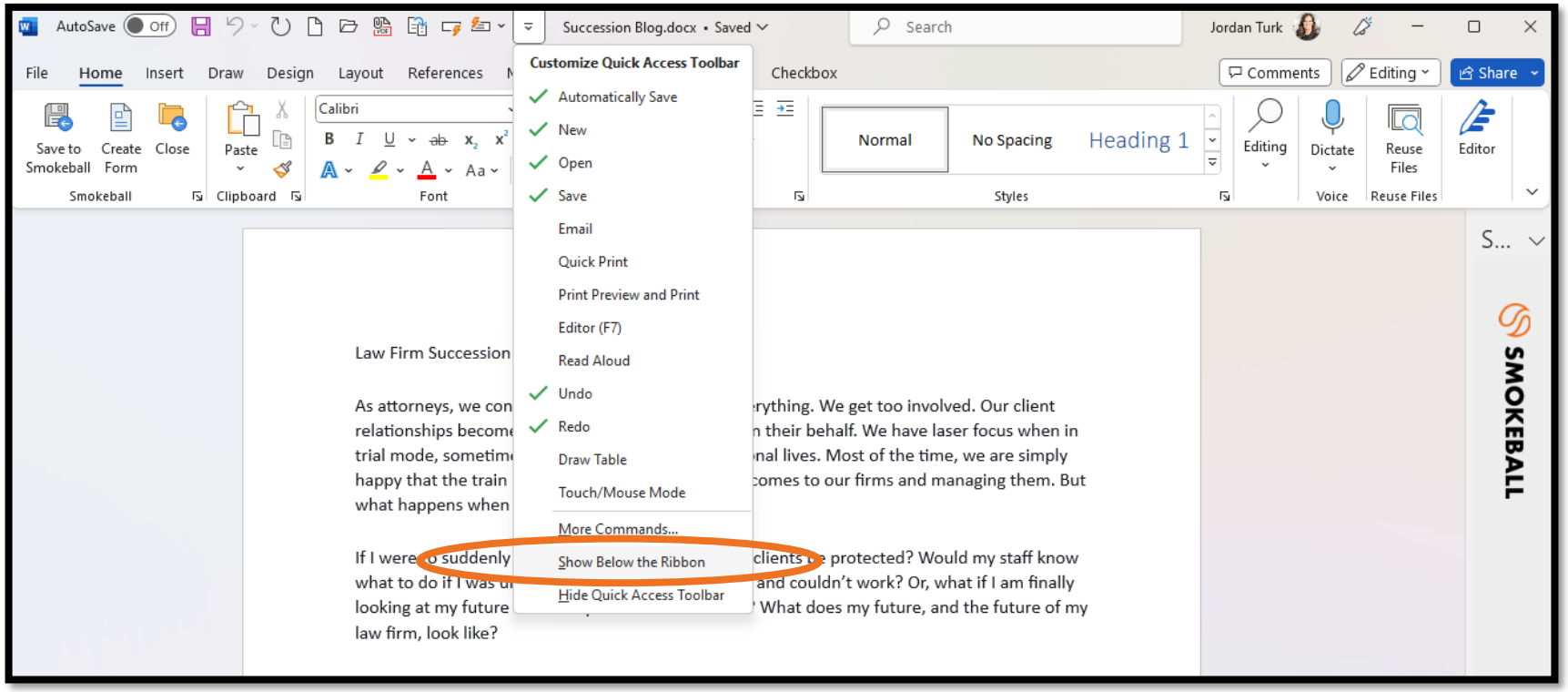


Quick Access Toolbar

Where is this thing?



You can change its positioning to make things more convenient:



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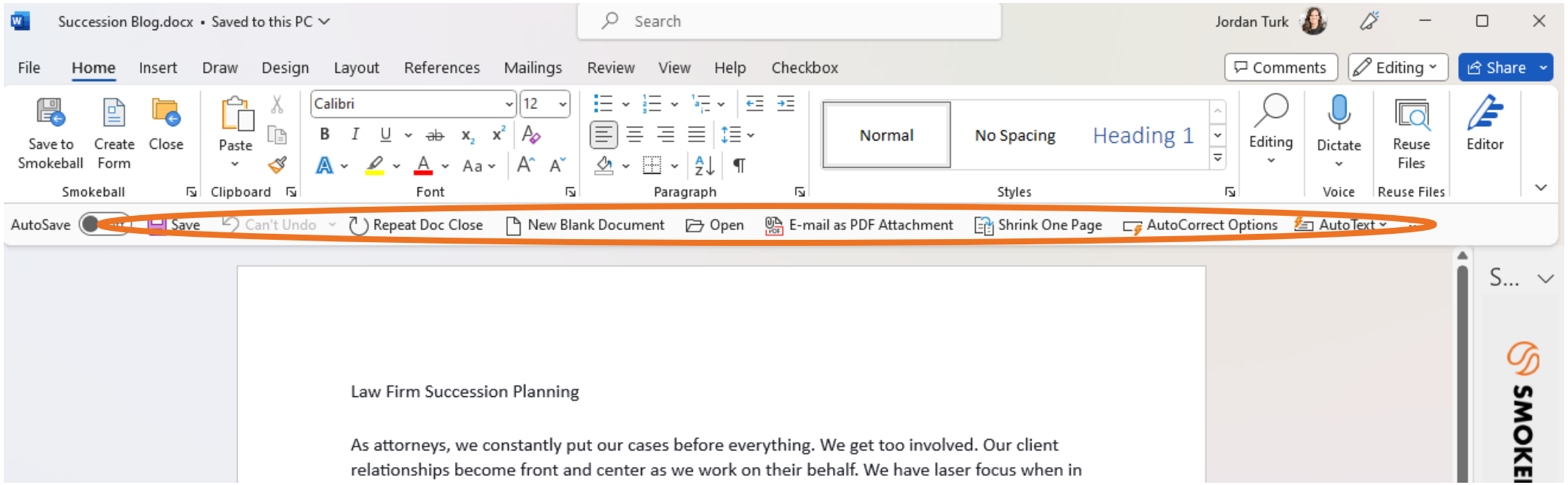
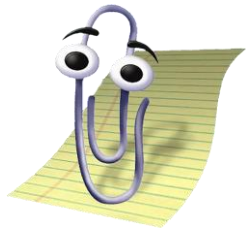
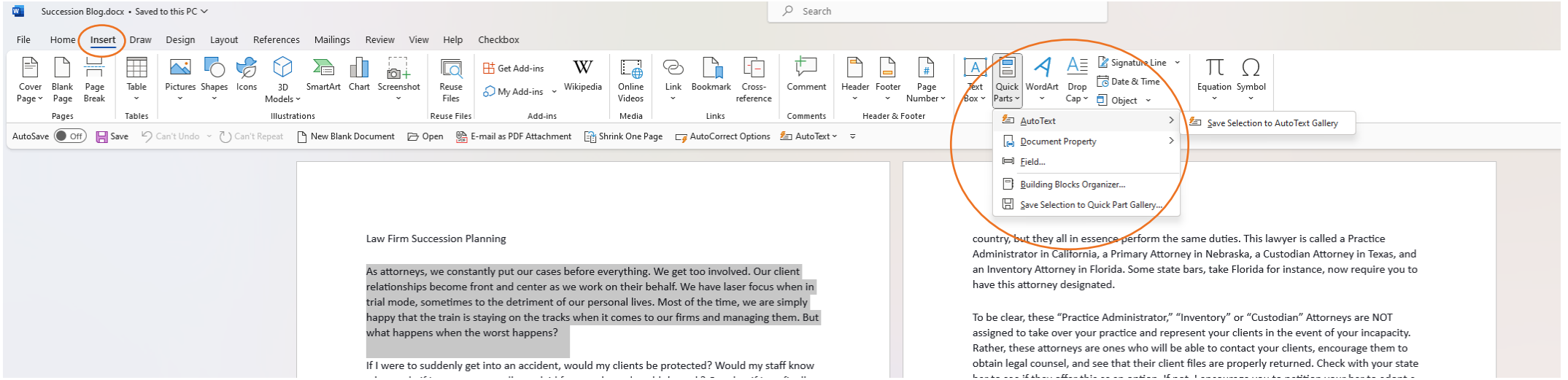




Automation

Word Automation –
Dipping Your Toe in the Automation Waters

- Saving templates/popular provisions for future use (Quick Parts)
- Additional uses: signature blocks, case styles, clauses you constantly use
- Can also add this to your Autotext!
- Caution: Quick Parts does not remember the formatting of the document that it originally came from; it will adapt to the document that you paste it into



Find & Replace Are Your Friends (but be careful)

Law Firm Succession Planning

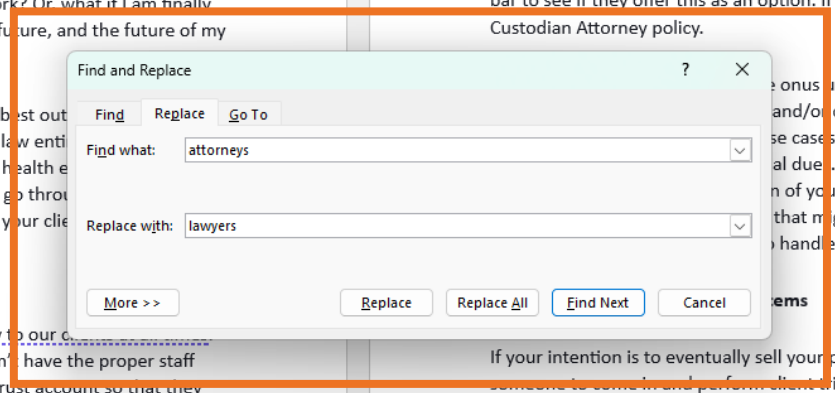
As attorneys, we constantly put our cases before everything. We get too involved. Our client relationships become front and center as we work on their behalf. We have laser focus when in trial mode, sometimes to the detriment of our personal lives. Most of the time, we are simply happy that the train is staying on the tracks when it comes to our firms and managing them. But what happens when the worst happens?

If I were to suddenly get into an accident, would my clients be protected? Would my staff know what to do if I was unexpectedly waylaid for months and couldn't work? Or, what if I am finally looking at my future with an eye toward retirement? What does my future, and the future of my law firm, look like?

Legal professionals need to plan for the worst in order to ensure the best out
ourselves and our practices. Whether it's a planned transition out of law enti
surprise cessation of practice (we are not immune from catastrophic health e
incumbent upon us to have a succession plan in place. Below we will go throu
making a law firm succession plan, including what duties you owe to your clie

Ethical Considerations

ABA Model Rule 1.6 reminds us that we owe a duty of confidentiality to our c
So, what happens when an attorney suddenly passes away and doesn't have the proper staff available to notify his or her clients? Who can access the attorney's trust account so that they can remit the proper amounts to clients who now have to rush and find new counsel?



country, but they all in essence perform the same duties. This lawyer is called a Practice Administrator in California, a Primary Attorney in Nebraska, a Custodian Attorney in Texas, and an Inventory Attorney in Florida. Some state bars, take Florida for instance, now require you to have this attorney designated.

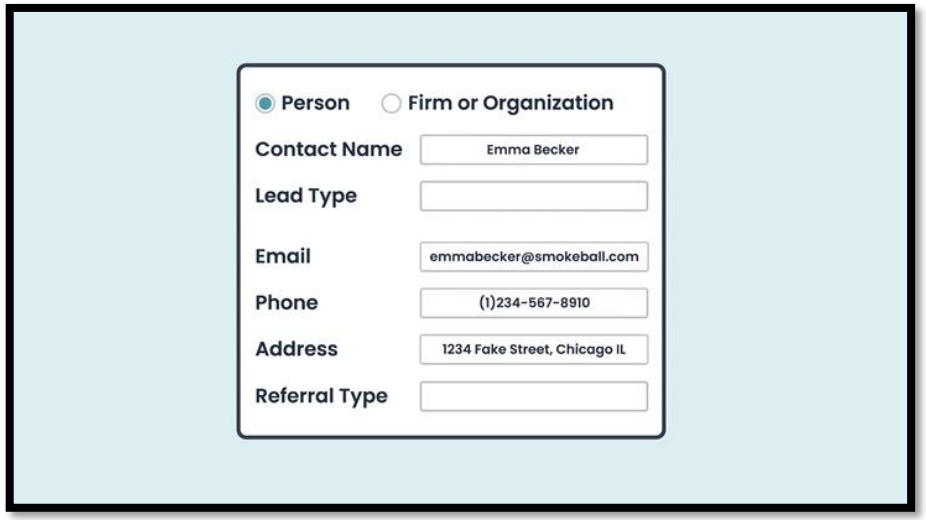
To be clear, these "Practice Administrator," "Inventory" or "Custodian" Attorneys are NOT assigned to take over your practice and represent your clients in the event of your incapacity. Rather, these attorneys are ones who will be able to contact your clients, encourage them to obtain legal counsel, and see that their client files are properly returned. Check with your state bar to see if they offer this as an option. If not, I encourage you to petition your bar to adopt a Custodian Attorney policy.

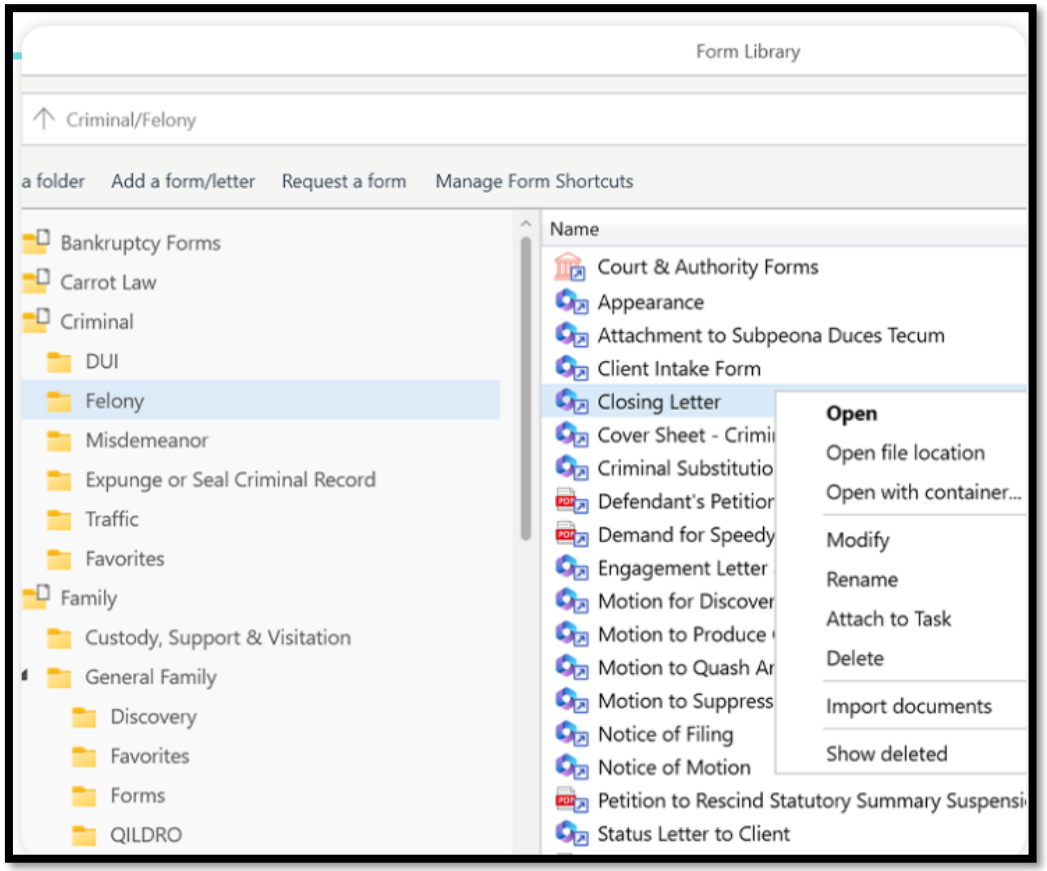
onus usually falls upon your state bar to handle incapacity or
and/or occupies valuable bar resources that are better spent
se cases start monopolizing the bar employees' workday, you
al due. Sometimes, a court has to step in and appoint a
n of your client files. Whether by state bar or by court, this
that might be detrimental to your clients' cases. This is why
handle these matters is key.

tems

If your intention is to eventually sell your practice, or if you simply want to make it easier for someone to come in and perform client triage in the event of your incapacity, I encourage you to adopt a legal practice management software. This legal technology, like Smokeball, allows for a single source of truth for all client documents and information. This means that a Custodian

Modern Automation Examples





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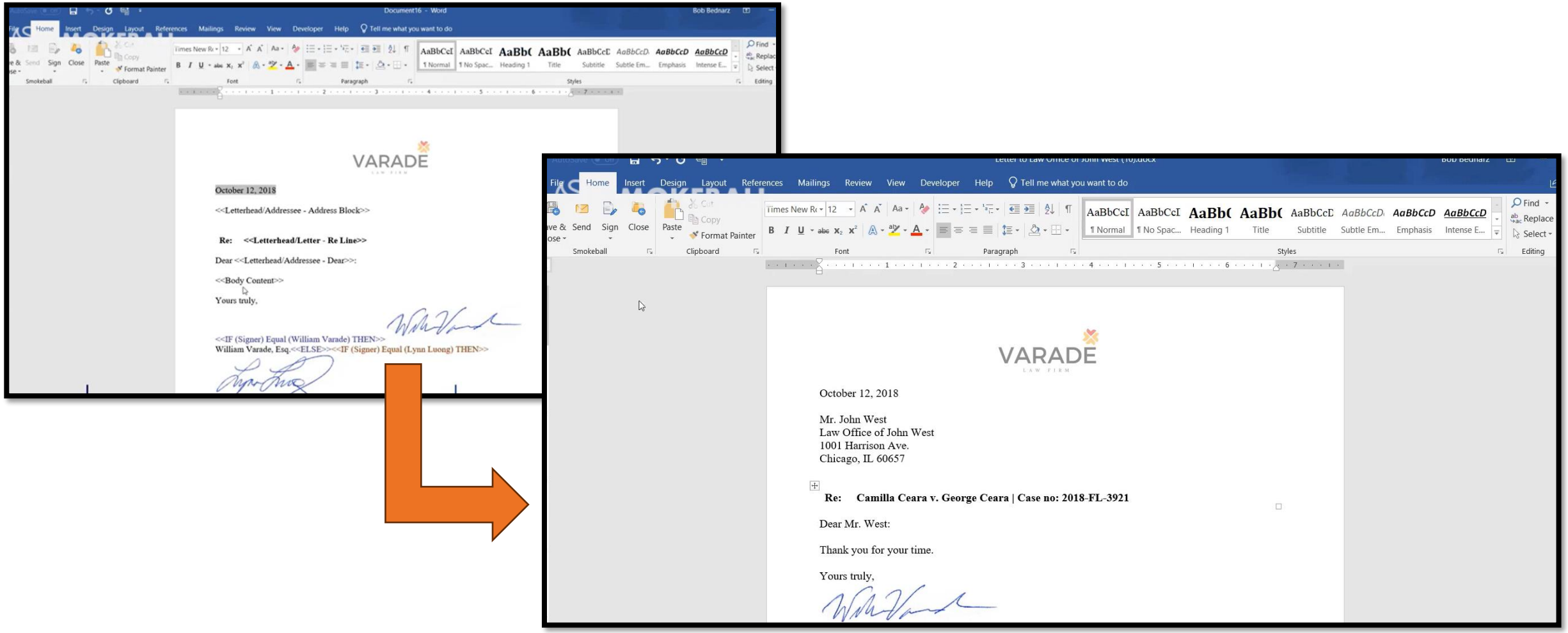
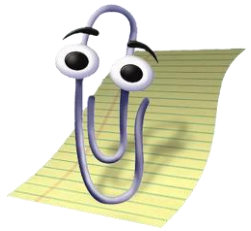


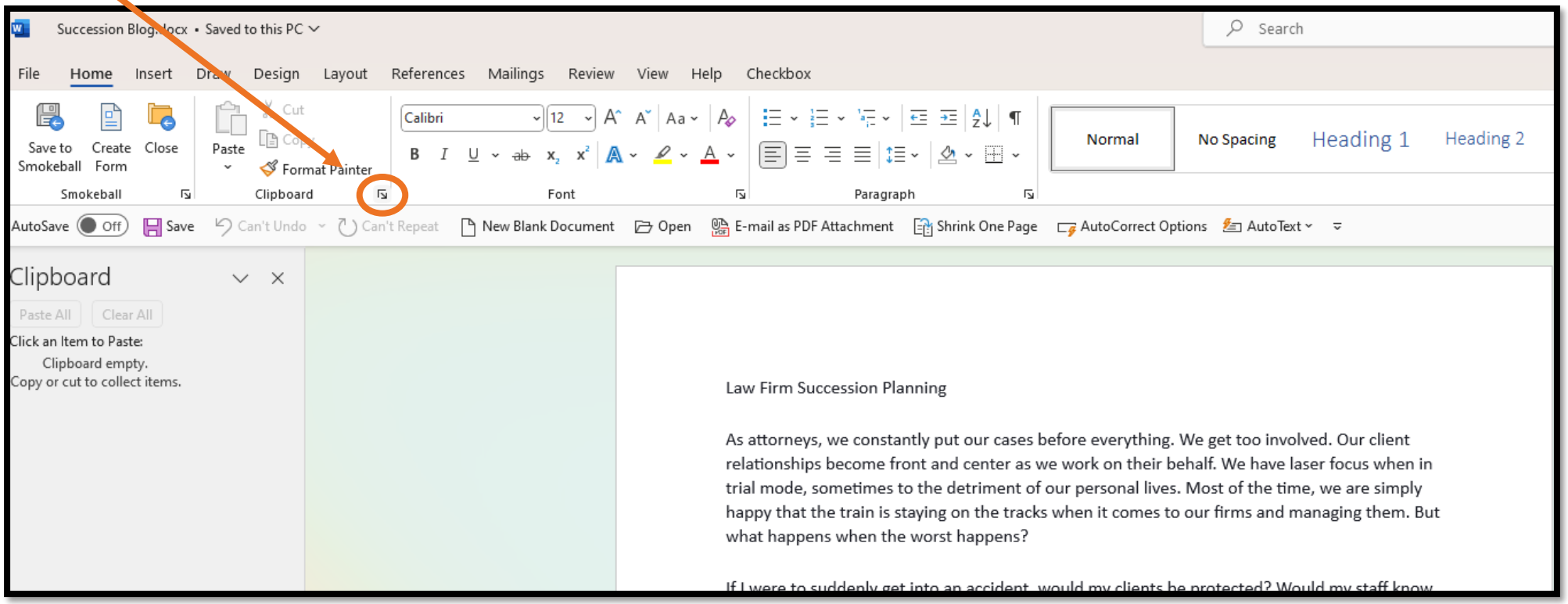


Clipboard

What does it do?

- Temporarily stores up to 24 things that you cut or copy
- **Caveat: you need to turn it on!**
- You cannot store your clipboard; as soon as you log out, Word will erase your clippings
- This is ideal if you are researching and grabbing a bunch of different paragraphs/text but don't necessarily want to go and paste them into your doc yet
- Select Clear All to get rid of your clippings

Clipboard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Create Form
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Format Painter
Clipboard
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Font
Paragraph
Normal
No Spacing
Heading 1
Heading 2
AutoSave
Off
Save
Can't Undo
Can't Repeat
New Blank Document
Open
E-mail as PDF Attachment
Shrink One Page
AutoCorrect Options
AutoText
Clipboard
Paste All
Clear All
Click an Item to Paste:
Clipboard empty.
Copy or cut to collect items.
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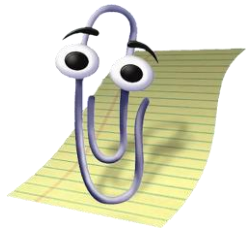

Paste Options

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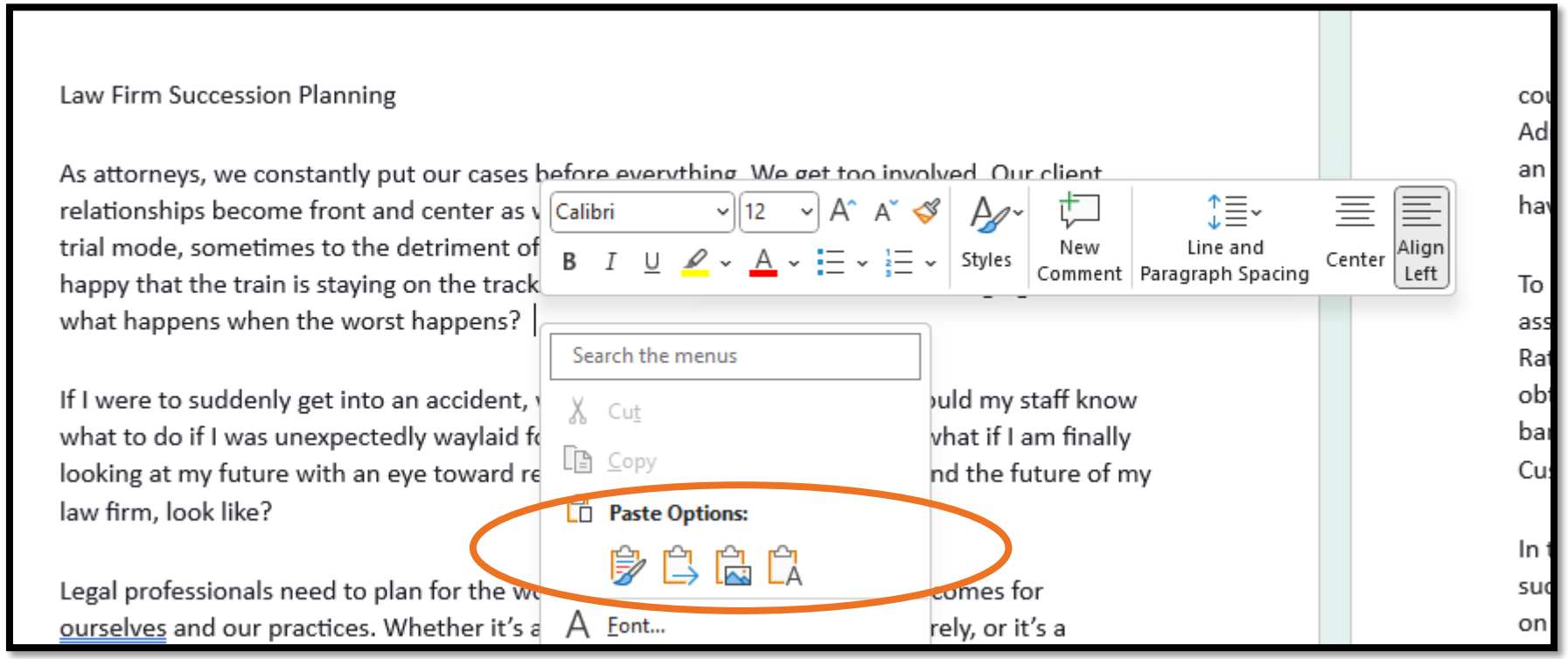
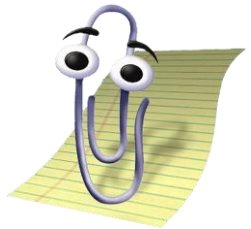


What do they mean?

- First Option: Keep Source Formatting (K) – pastes exactly as you found it
- Merge Formatting (M) – to the extent that you doc is set up properly and has the correct default font, it will adopt the master font of the doc
- Picture (U) – don't use this; you won't be able to edit anything
- Keep Text Only (T) – will use whatever font is in the paragraph that you are pasting into, and will also remove extraneous formatting (might get rid of italics that you wanted to keep, etc.)

Merge Formatting is usually the ideal option

Note: CTRL + V pastes in a specific way, and the default is Keep Source Formatting (but you can change this!)



Final Tips

Final Tips

- Changing default font and spacing
- Securing documents (making them read-only)
- Removing metadata
- Deleting annoying shortcuts (© €), and adding better ones (§)
- Play around with the autocorrect tab!

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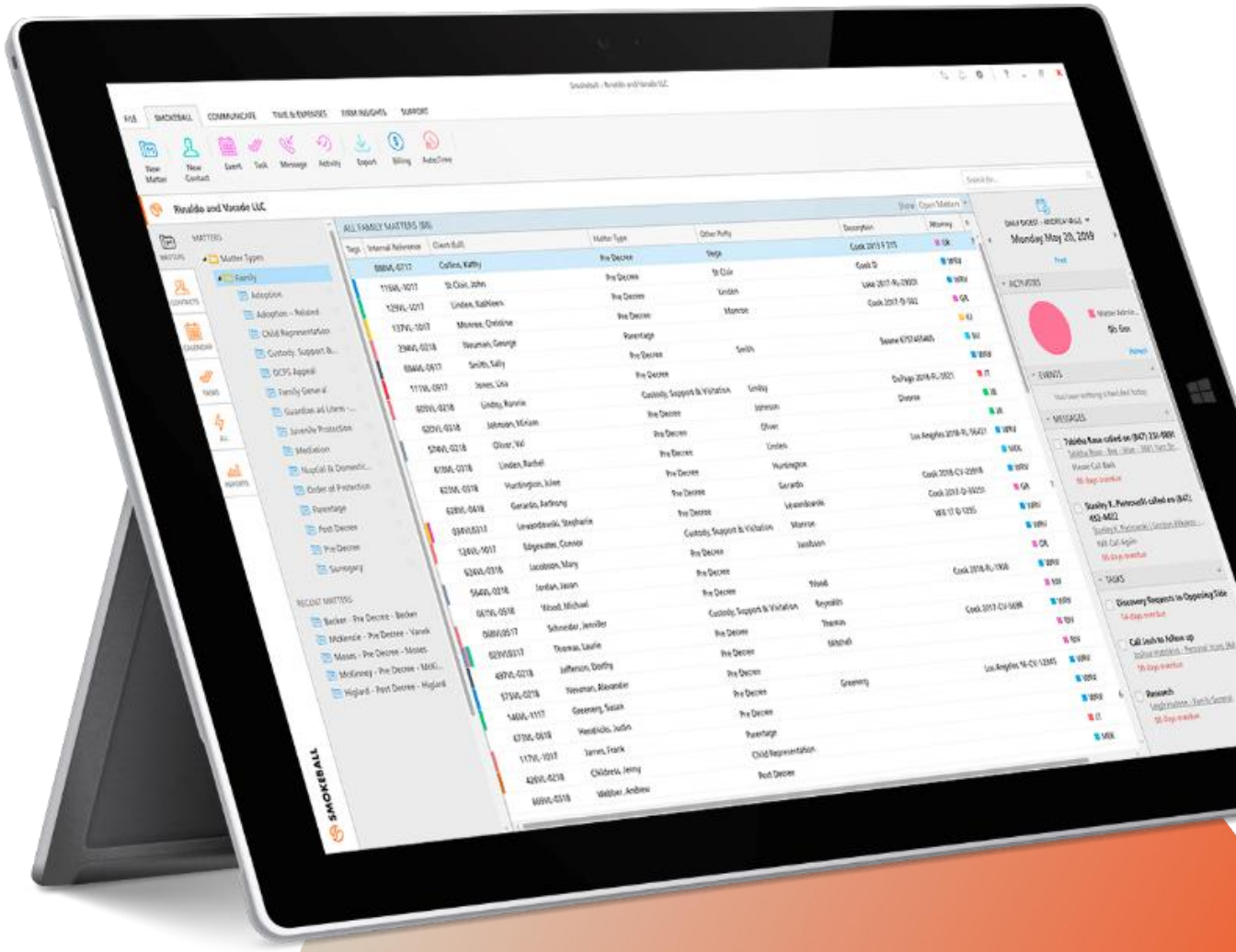

Poll: Would you like to speak with a Smokeball representative about how Smokeball can help your firm grow?

If **yes**, one of our law firm specialists will follow up.

YES, I'D LOVE TO

NO, NOT AT THIS TIME

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CLE Credits:

- General – 1.0 hour
- Technology – 1.0 hour

Additional Information:

The course number for today's webinar is **8195**. This webinar has been approved by The Florida Bar Continuing Legal Education Department for 1.0 hour of General CLE credit, including 1.0 hour of Technology CLE credit. Please self-report this course in the member portal.

Questions?

Thanks for joining!

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