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Building a foundation for your growth  
and survival in a age of accelerating change.

Remember the term  
*“Accelerating Change”!*

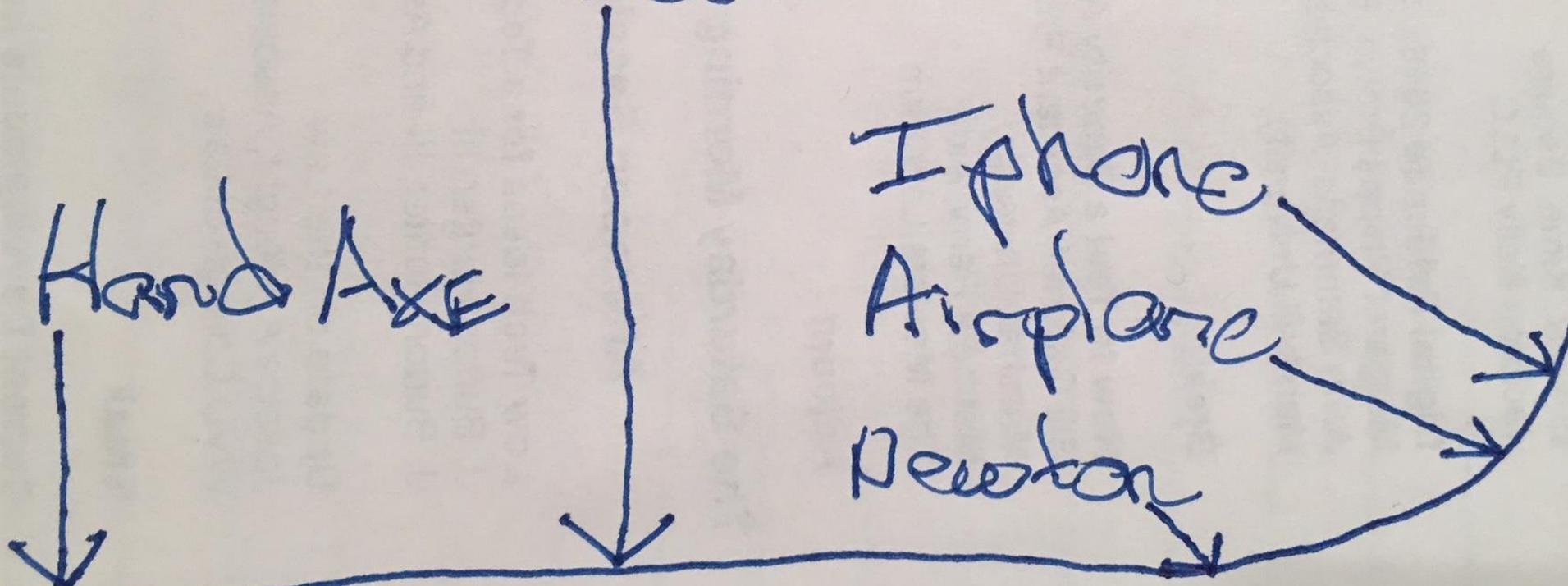
Bow  
Arrow

Hand AXE

Iphone

Airplane

Newton



**HOW CAN I AVOID  
BITING OFF MORE  
THAN I CAN CHEW?**



# My Roots



# My Website

**J. BURTON HUNTER, III**  
AND ASSOCIATES, PLLC



Search

To search, type and hit enter.

Home

Our Firm

Attorneys

Practice Areas

Videos

Blog

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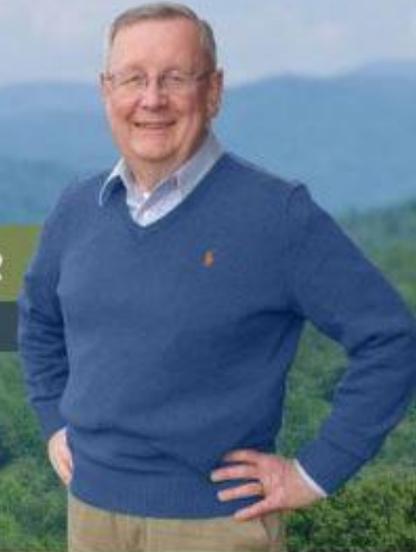
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**Committed. Competent. Compassionate**

The Decision is Simple.



Explore Blog Resources



Mr. Hunter's New Video Series



**My Practice Areas**

# My Message to Colleagues



<https://youtu.be/oypI1X0fLj4>

## Mr. Hunters Message to His Colleagues



J. Burton Hunter III & Associates, PLLC

 **Subscribe** 1

25 views

# The BIG Picture

*“Fantasyland: How America Went Haywire”*: Kurt Anderson

*“The Demon-Haunted World: Science as a Candle in the Dark”*: Carl Sagan

*“Thank You for Being Late”*: Thomas Friedman

**The bastion of civilization:**

**Lawyers + Scientists**

# Building the Foundation

- I will talk about what I know from 42 (of 46) years as a small firm trial practice in a rural WV county seat.
- This part of my presentation will probably be most helpful to an under ten-year practitioner, or someone starting a firm.
- But what I can do is give you a blueprint to my entire blog, most of which has been reviewed and rewritten at least twice, 1380 pages, 368 article, over nine years, and four introductory videos.
- It is located at [www.hunterlawfirm.net](http://www.hunterlawfirm.net).
- It is downloadable as a PDF book, with table of contents: <http://hunterlawfirm.net/request-book/>

# Fundamental Skills I

- **Running a business;**
- **Accounting**, profit and loss statements, balance sheets, statements of net worth, cashflow, trust accounts, double entry bookkeeping, building maintenance, marketing.
- **Software**
  - Accounting; In Buckhannon, our accountant knew Quickbooks Pro. My wife became comfortable with it, so we use it.
  - In preparing for this presentation, I found this website, leanlaw.com, and this article on Quickbooks Online: <http://www.leanlaw.co/qbo-for-attorneys/>
- **The Power of Microsoft:**
  - Word
  - Excel
  - Access (**Consider Airtable**)
  - Outlook
  - PowerPoint
  - Publisher (Avery.com)
  - OneNote

**Federal Taxes (payroll and Federal Unemployment payments): Frequency of deposits determined by size of payroll**

[www.eftps.gov](http://www.eftps.gov)

**You need social security number or EIN, pin, and password (obtained when you sign up on web site).**

**Bank and account number, routing number also needed**

**West Virginia State Taxes (payroll) [www.mytaxes.wvtax.gov](http://www.mytaxes.wvtax.gov)**

**You need user name and password (obtained when you sign up on web site).**

**Bank information needed**

**State Unemployment (WorkForce West Virginia)**

[www.workforcewv.org](http://www.workforcewv.org)

**You need your assigned account number, user name and password (obtained when you sign up on web site).**

**Bank information needed**

**Worker's Compensation**

**This is handled privately through your choice of insurance company.**

**Contact your local business insurance company for further information and set-up.**

**If you pay self employed income taxes, work with your accountant to determine the quarterly amount you need to deposit with the State and Federal governments.**

**Any federal government forms can be obtained at [www.irs.gov](http://www.irs.gov);**

**Social Security Administration <https://www.ssa.gov/>**

Trust Accounting

Accepting Credit Cards

# J Burton Hunter III and Assocs, PLLC ▾

Free



SHARE



Design Project Pipeline



Advertising Campaigns



Digital Video Production



PR Outreach



Agile Project Tracker Template



Event Marketing



Content Calendar



Launch Calendar



Legal Case Analysis



ORGANIZER2017



Katherine from Airtable

Tip: drag and drop attachments Did you know you can drag file attachments directly into



Katherine from Airtable



	ClntNameLastMIFirst	DOB	Address...	ClntNo.	Phone Home	Cell	Work No.	Employer	Employer Address	Notes
1										
2										
3										

+

Katherine from Airtable  
 Tip: Airtable's powerful copy and paste If you're trying to move information between Airtable ta...

Katherine from Airtable  
 New feature: row height Want larger pictures or more text in your grid views? You can now adju...

Katherine from Airtable  
 Tip: turn your primary field into a formula Did you know that you can set the primary field to be a...

# Fundamental Skills II

- Word (Don't forget Barron Henley!)
  - Pathagoras Document Assembly
  - Learn Word! Ribbons, Styles, & the Rest
  - Dragon Naturally Speaking Professional
  - iPhone App Dragon Anywhere
  - Lynda.com, Udemy.com, and YouTube
  - Outlines (I love outlines!)
  - Understand PDF, Adobe; DC, Power PDF

# Outlines, cont.

- My Foundation for Trial Preparation: Have something like Danners!
- If You Are a Trial Attorney, Master Those Skills! WVAJ, Defense Trial, Books.
- Trial Checklists
  - Litigation Outline
    - **Client Intake**
    - **Pretrial Preparation**
    - **Discovery**
    - **Issues of Fact**
    - **Issues of Law**
    - **Pretrial Motions**
    - **Opening Statement**
    - **Plaintiffs witnesses**
    - **Defense witnesses**
    - **Instructions**
    - **Closing Argument**
    - **Post Trial Motions**
    - **Appeals**



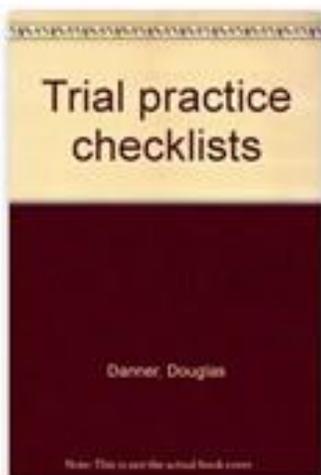
Trial Practice Checklists: Douglas Danner: Amazon.com: Books  
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### Trial Practice Checklists Hardcover – 1989

by Douglas Danner (Author)

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# Fundamental Skills III

- **Excel**
  - **Learn it! Master it!**
  - **Track your practice;**
    - **Expenses list;**
    - **Income sources;**
    - **Total average monthly income and expenses?**
    - **To annual income and expenses?**
    - **Percentage of total income?**
    - **Percentage of Total expenses?**
    - **Total hours worked per practice areas; e.g. 1500 family, 500 civil, 350 hour personal injury.**
    - **Average hours tracked per day/month/year, and five, ten, fifteen, and twenty year trends.**
  - **Equitable Distribution Spreadsheet.**
    - **Intake sheet; proposed equitable distribution; consolidated financial affid, 3 column budget.**
    - **Judge Goldberg's alimony formula.**

# Fundamental Skills IV

- **Publisher**
  - **Signs;**
  - **Business Cards;**
  - **Office and window signs;**
  - **Newsletters (the legendary Hunter Family Christmas Newsletter);**
  - **Firm Brochure; and,**
  - **Saving to PDF or jpg.**

# Fundamental Skills V

- Powerpoint
  - CLE presentations;
  - Slide photos: most recently, wrongful death family photos;
  - Community speaking events;
  - Opening statements;
  - Closing Statements;
  - Motions; and,
  - Demonstrative or Illustrative exhibits.

# Fundamental Skills VI

## Outlook; The Love Hate Relationship

If you find practice management software that works for you, go for it!

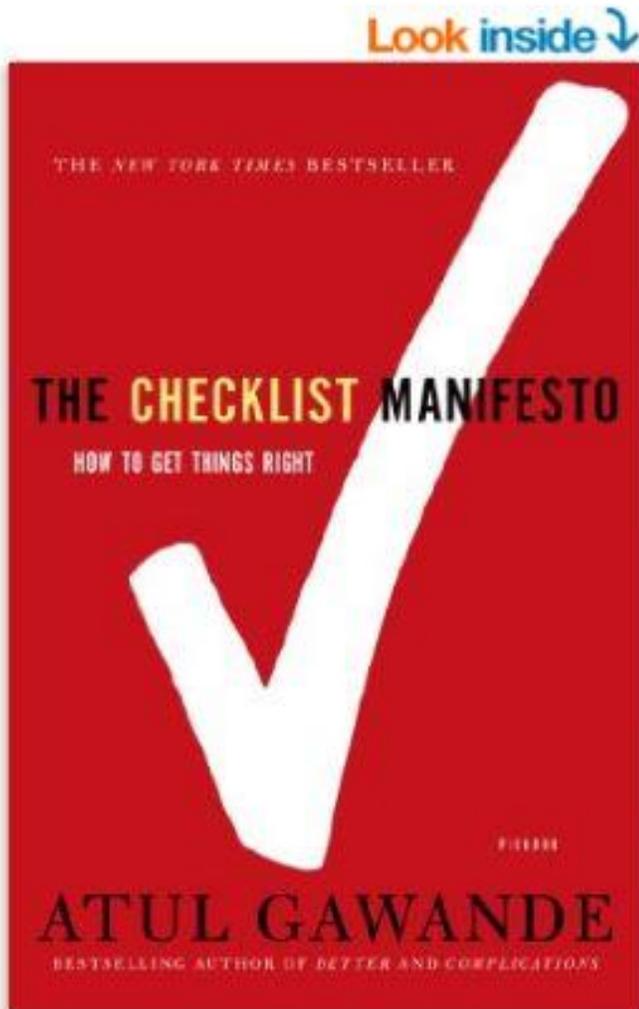
1. **Your calendar: We insert each scheduling order the day it comes in! Be sure to Autoarchive**
2. **One master calendar.** Works for a sole practitioner.
3. **Tasks;** I gave up and use Wunderlist. Others prefer Todoist;
4. **Link to Evernote:** forward e-mail to your Evernote inbox.
5. Others prefer **OneNote**, the Microsoft equivalent.
6. Contacts.
7. **Lynda.com; Udemy.com; and Steve Dotto:** Kubota; This Old House! Food Network.

# Fundamental Skills VII: Pathagoras Document Assembly

**It's called "document assembly"**

- **Affordable;**
- **Word based: no programming required;**
- **User Friendly; BUT, there is a big "but";**
- **My best use is family law, pleadings, parenting plans, property agreements, and orders;**
- **Masterlist;**
- **Unique relationship with the founder;**
- **A vault of templates/forms;**
- **Impress clients;**
- **Control Mediations; and,**
- **Compete against "the naturals".**

# Suspense, Checklists, and Systems!



## The Checklist Manifesto: How to Get Things Right

Paperback – January 4, 2011

by Atul Gawande (Author)

★★★★★ 1,316 customer reviews

#1 Best Seller in Pathology Clinical Chemistry

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\$10.99 or 1 credit

or 1 credit

Audio CD  
\$25.42 ✓prime

18 Used from \$17.48  
32 New from \$18.99

# Checklists for Everything

- **We try to have a checklist for everything:**
  - **Client intake;**
  - **Prehearing meetings;**
  - **Detailed PI intake and history forms;**
  - **Pre-mediation meetings;**
  - **Pre-guardian ad litem meetings;**
  - **Uncontested Final Divorce Hearings (that was my first, 1976);**
  - **Pre-deposition meeting;**
  - **Creating the equitable distribution spreadsheet;**
  - **Adoption intake;**
  - **Will intake;**
  - **Document signings, and the rare closing checklist;**
  - **File closing; this is critical; why leave malpractice timebombs when they can be avoided?**
  - **Never, never, never a service without a signed fee agreement. (Combine simple fee agreements with letters to client, engagement letters, and printed contracts.)**

# When it is OK to Keep Them In Suspense?

- **My first secretary, now a healthy age 82, laughed to learn that I still use her suspense system.**
- **It is a plastic bankers' box with 31 dropdown folders.**
- **The rule is nothing goes out without being "suspended" for 10 days, 2 weeks, or 3.**
- **The physical file copy is simply dropped into a folder. The second job of the day, after checking the answering machine, is for a staff member to pull out the suspended documents for the day.**
- **Thus, we keep a file copy of every pleading letter we send out.**
- **You will NOT want to adopt the low tech system. My correspondence is now 75% e-mail, copied to my staff, whose suspense it digitally. And soon we will have e-filing.**
- **So any young lawyer and anyone opening a law office needs to do their homework on this issue. It needs to be automatic that these time sensitive things come back to you.**
- **I picked up a free book at the WV State Bar Annual Meeting, "The Secrets to Marketing & Automating Your Law Practice, by David M. Bitton, CEO of Practice Panther.**
- **That a great bargain, and a fair summary of the challenges. I haven't used the software.**
- **The blurb on the cover promises \$300 worth of free video tutorials.**

# A Simple System of Prioritization

- I have heard this system attributed to Dwight Eisenhower
- Type the word “productivity into Amazon’s search engine, and you’ll have a dozen books promising a stress free path to productivity.
- Here’s a simple one:
- **Keep a task or “to do list”.** (Wunderlist, Todoist, Evernote, Outlook, or even Legal Pad)
- **Have 3-4 categories: (Wunderlist allows sub-tasks, recurrent daily, “today”.)**
- **Urgent, but not important:** These tasks are imposed on you by someone else. In family law it’s a plague, but I try to answer quickly, but thoughtfully. I use concise (one or two line), numbered, paragraphs with a plan of action. I copy staff, and more recently the court appointed Guardian Ad Litem. Some of these can be delegated.
- **Urgent and Important:** These are easy to identify. They MUST be done. It may be a result of a failed checklist or suspense system, illness, or vacation break, but these MUST BE DONE!
- **Important but not urgent:** These are your projects; learning Word or Pathagoras, blog writing, building a deck, or planning a vacation. If you are not going to become a boring drudge, or “same ole – same ole”, you MUST set time for these, perhaps at the home office.
- A favorite for us is a February “working vacation”. I work at least six hours, writing and editing.

# Time to Move to, or Upgrade, Your iPhone?

This Field Guide to the iPhone is current and comprehensive. I found a review in [iphonejd.com/iphone\\_jd/2018/04/review-iphone-field-guide-david-sparks.html](http://iphonejd.com/iphone_jd/2018/04/review-iphone-field-guide-david-sparks.html)

The best format is a download to iBooks.

Which phone? Accessories; Features; Siri, Dragon dictation; making calls, messaging; e-mail; photography; security; cloud storage; web browsers; health apps; contact apps; weather apps; calendar apps; task managers; many others. 400 comprehensive pages!



# Productivity Blog Articles

-  A Few Thoughts on Law Office Technology.docx
-  A Low Tech Tickler or Suspense System.docx
-  A PATHAGORAS REFRESHER.docx
-  Document Assembly for the Busy Non.docx
-  Document Assembly for the Busy Non2.docx
-  FewWordsTechnology.docx
-  KEYS TO SUCCESS.docx
-  LowTechFundamentals.03.08.2018.docx
-  LowTechTimeManagement.docx
-  Suggestions for Operating and Marketing A Small Firm Efficiently and on a Budget.docx
-  WhyLawyerUnderstandTechnology.docx

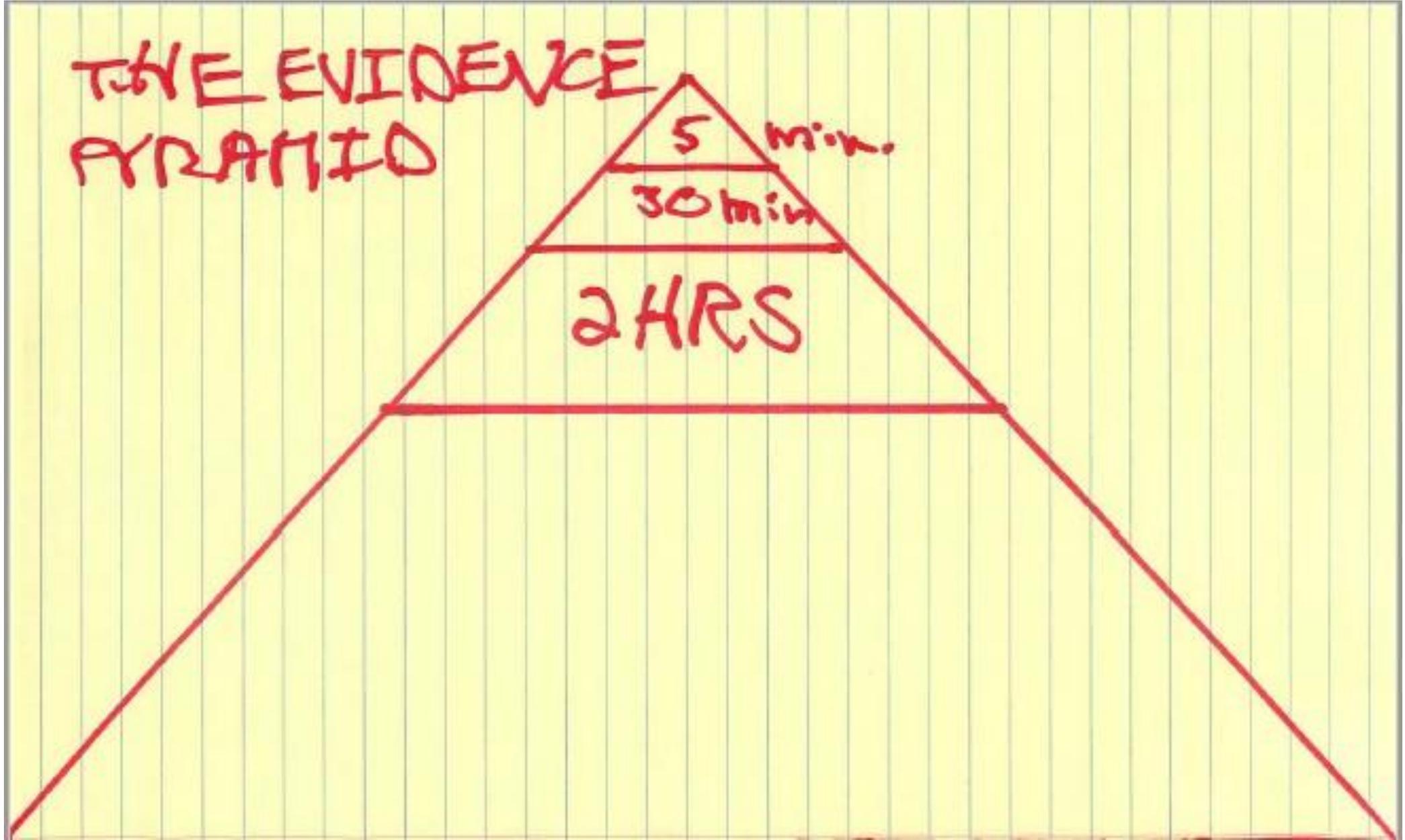
# The Conning Tower



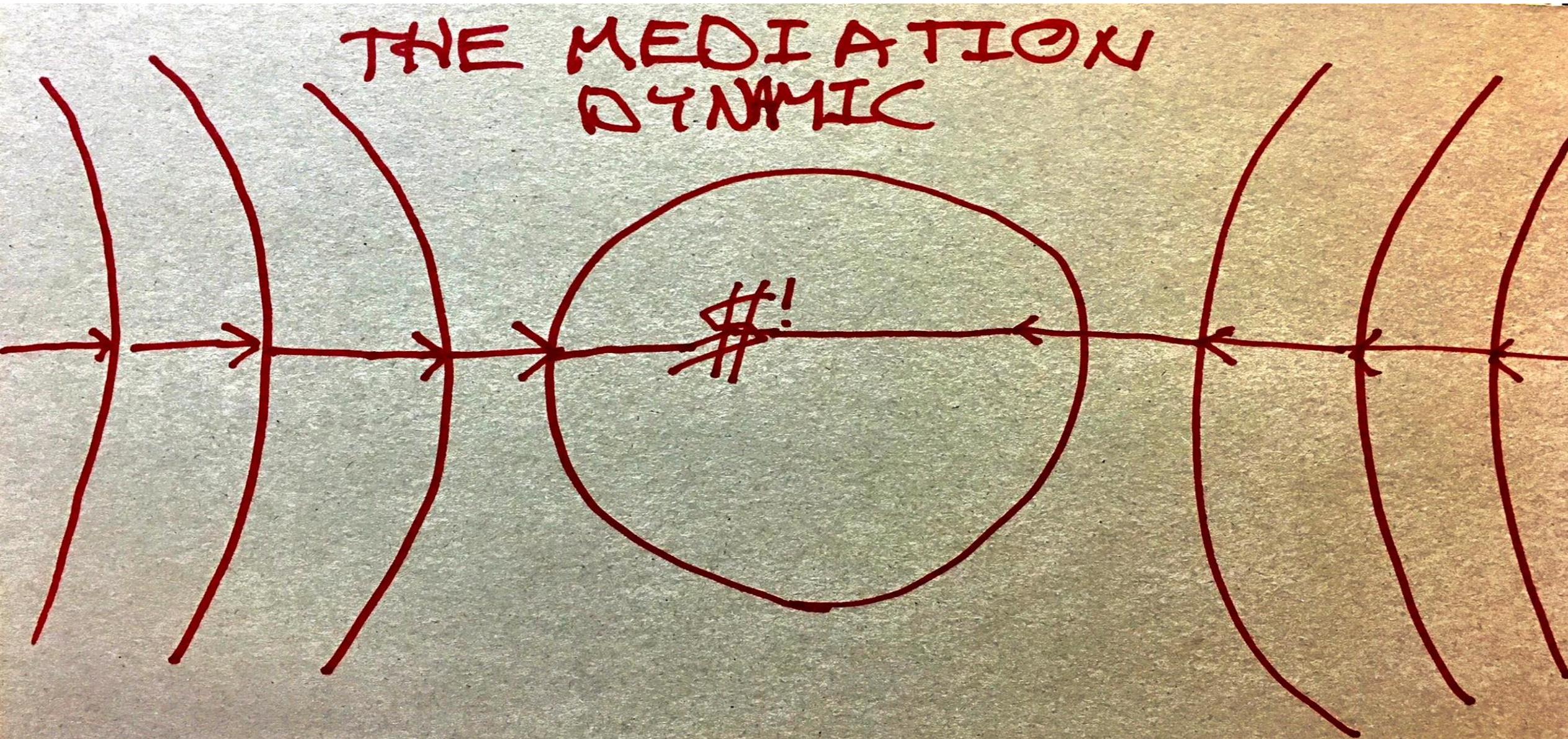
# Digging Down: Organizing the Facts

1. If you can afford it, I'd recommend the CaseMap Suite of Products.
2. Or, I'll give you a database template made in an Airtable database I created that does much the same thing. I confess that it takes discipline to enter the data that our family cases don't seem to justify. <https://tinyurl.com/ybe7bzu8>
3. So, here's a paper alternative. We create a kit in an accordion folder.
4. Three legs of a sturdy stool:
  1. **Object lists** (puzzle pieces); people, documents, photos, places, organizations, physical objects.
  2. **Burt's Top Ten Lists:** the clients concerns, questions, memory ticklers; mediation issues, accusations. Each list must have its descriptive heading.
  3. **Chronology (Timeline);** this is created at the end of the process, for mediation or trial.
  4. We empower the client, especially the ones who are the most determined.
  5. It helps us provide access to justice at lower cost.
  6. <http://hunterlawfirm.net/digging-2018-short-sweet/>

# The Evidence Pyramid



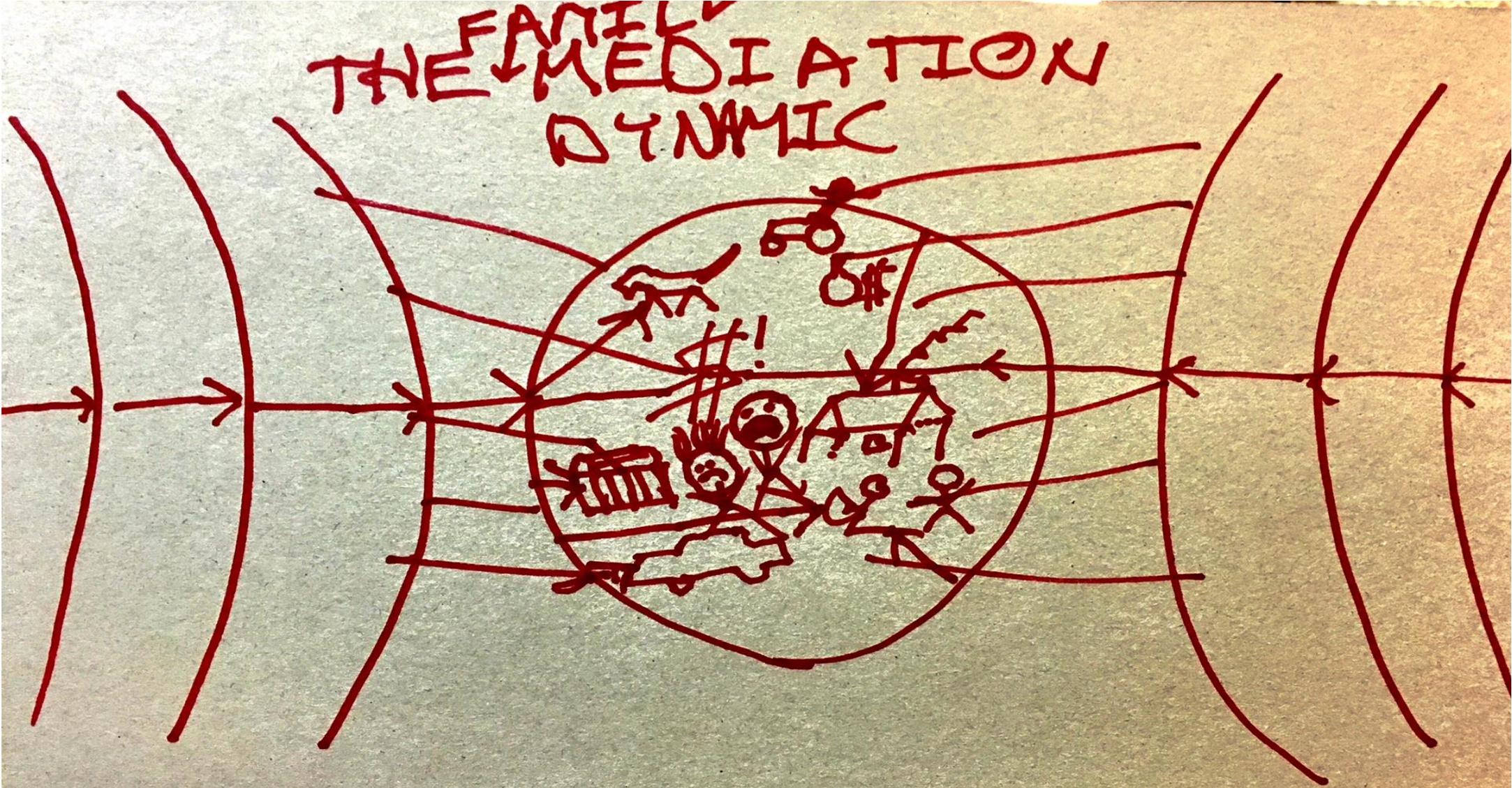
# The Mediation Dynamic



The

# Family Law

Mediation Dynamic !



# A Few Words About Marketing: the Basics

- **You probably need to be pretty good.** If you are born with some beneficial blend of intelligence, passion, creativity, innovation, and compassion, you will do fine. Mail it in? Hate change? Detest long hours? Don't like the work? !!!
- **You need a blog, personal Facebook, professional Facebook, Twitter, Linked in, and Google + Accounts.**
- **I use Yext, \$100/mo.** to keep my profile, with photos, website links, reviews, and connections, consistent and updated.
- **You need to know what you are talking about** and write from the heart.
- **Share each post** to the sites above.
- **On a rating site like AVVO,** fill in your profile and accomplishments carefully. It took me three hours to do from 6.5 average to 10.00 Superb. (Be aware new disciplinary rule. Think of the boy with his thumb in the dike. (Geico)
- **You must have good reviews.** Don't pay for them. But I do give my staff an incentive each time they ask and get us a good review.

# Preparing for the End; Coping With the Pressure

- I have been beating the drum for office efficiency and technology as a way to avoid impaired lawyers committee, lawyers transitioning poorly to retirement, and malpractice claims.
- I was told by people “very high up”; “Burt, you can do that stuff, but they won’t do it!” I could not more strongly disagree.
- Checklists, systems, forms, intake maps?? Help to avoid losing track!
- The magnificent ScanSnap scanners.
- Never save a paper file.
- In the file.
- Networked lawyers have others to turn to for support, expertise, emotional support; WVAJ, State Bar, WV Bar, Family Law Committee, Family Law Mediation Subcommittee, Future of the Law, local bars.

# Unbundling, Ghost Writing, Mentoring, and Coaching

- I write extensively on this subject;
- Gone is the \$100-\$200 to chat for 30-60 minutes.
- First, I cannot do it. The client needs more, and \$500 allows me to give them \$1000 worth of information and up to three hours of my time.
- Our “legal checklist” includes stuff the client won’t think of:
  - Insurance coverages;
  - Powers of attorney;
  - Problems with neighbors, families, etc.
- Ghostwriting; letters, pleadings; motions, and mentoring.