Legal Tech Media Group

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Videoconferencing and Remote Collaboration Tools

CHELSEY LAMBERT

Solo and Small Law Firm Technology Specialist, published Author and CLE Speaker.

Chelsey has worked in all areas of legal technology and marketing, including building products for small law firms.

She transitioned into the role of consultant and technology trainer as a Practice Management Advisor for the Chicago Bar Association. Today, she writes the legal technology blog LexTechReview.com.

Setting Expectations

Communicate	Note	Reassure
Communicate with PNC's and Clients that they have options	Note delays or procedural changes that will impact their case	Reassure them that you are still operational and managing their case

Video Conferencing

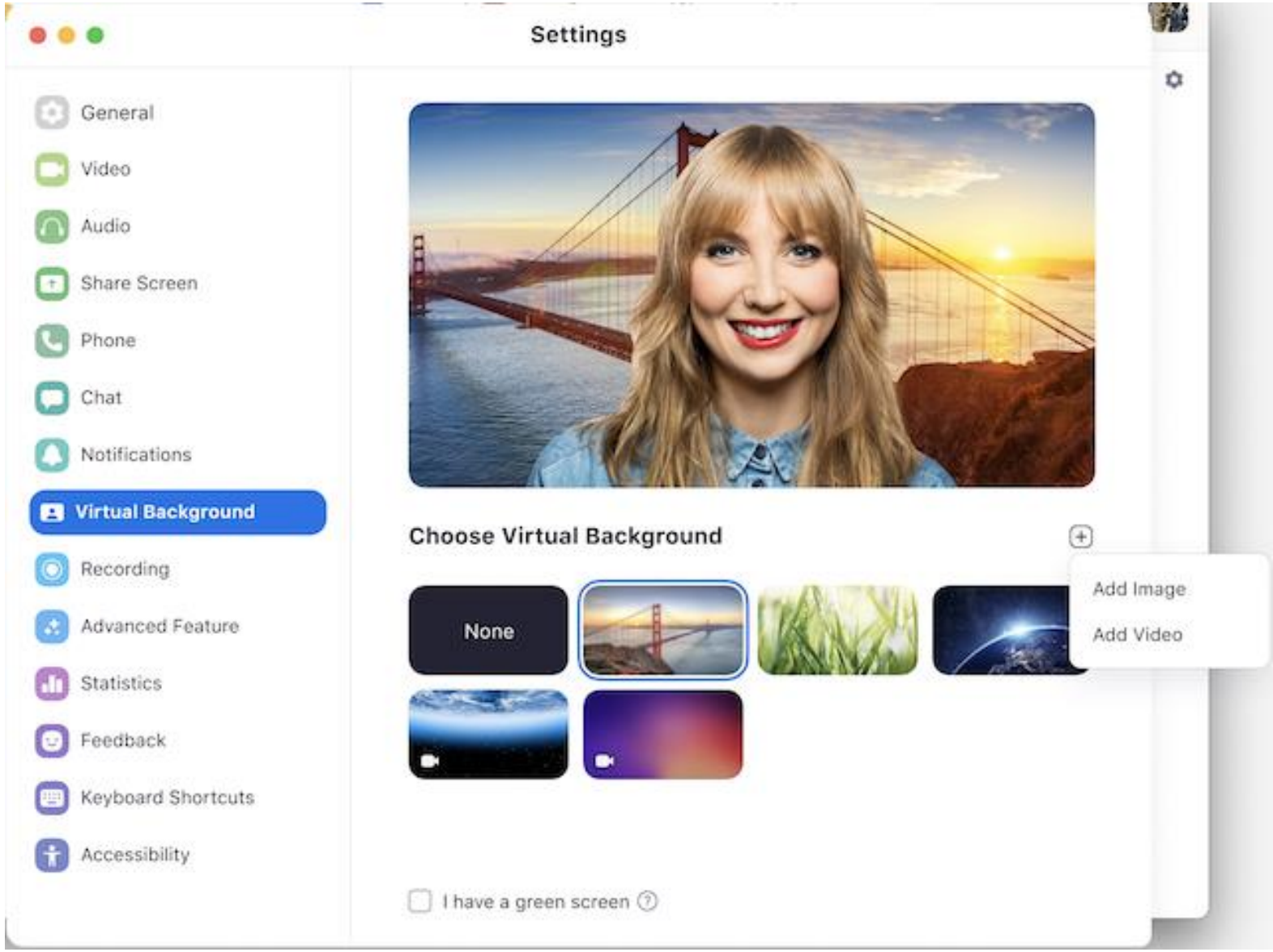
Etiquette and Attire

Get	Try	Set	Be
Get dressed like you were going to work	Try to find a quiet place	Set “office hours” or notify family of “critical meeting times”	Be mindful of your background – Use Zoom Virtual Backgrounds

Go the Extra Mile

- Lighting – Use natural lighting or a kit
- Angle the camera at eye level
- Participate do not get distracted

zoom


Settings
General
Video
Audio
Share Screen
Phone
Chat
Notifications
Virtual Background
Recording
Advanced Feature
Statistics
Feedback
Keyboard Shortcuts
Accessibility
Choose Virtual Background
None
Add Image
Add Video
I have a green screen

Canva.com
Zoom Virtual Background Templates

chelsey.lambert
Add your picture

Create a design

Home
All your designs
Templates
Photos
Print
Apps
Brand Kit
Design School
Create a team

Folders
Webinar Post
Trash

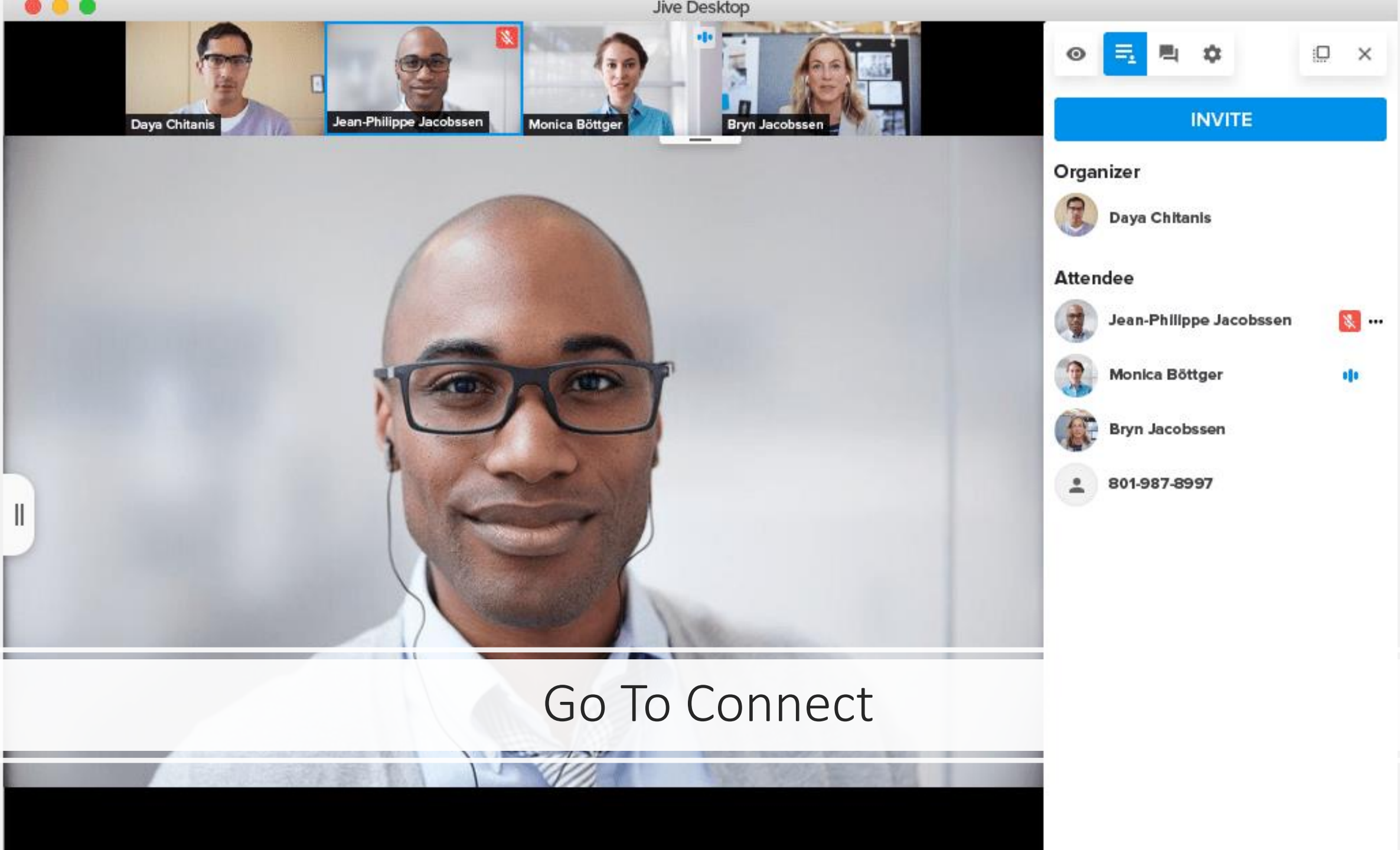
zoom background

Home > Templates > Zoom Background

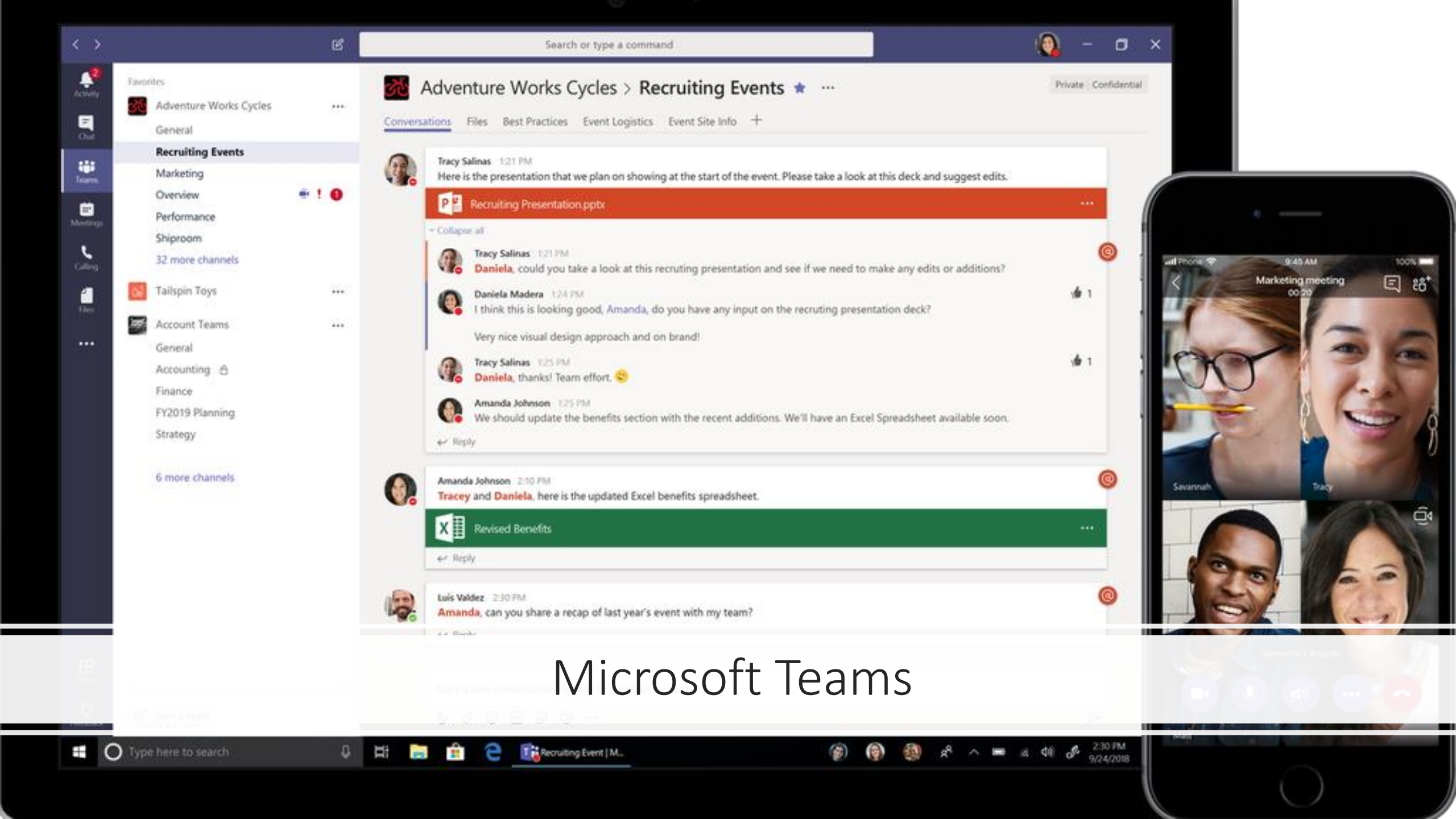
Zoom Background templates

Browse high quality Zoom Background templates for your next design

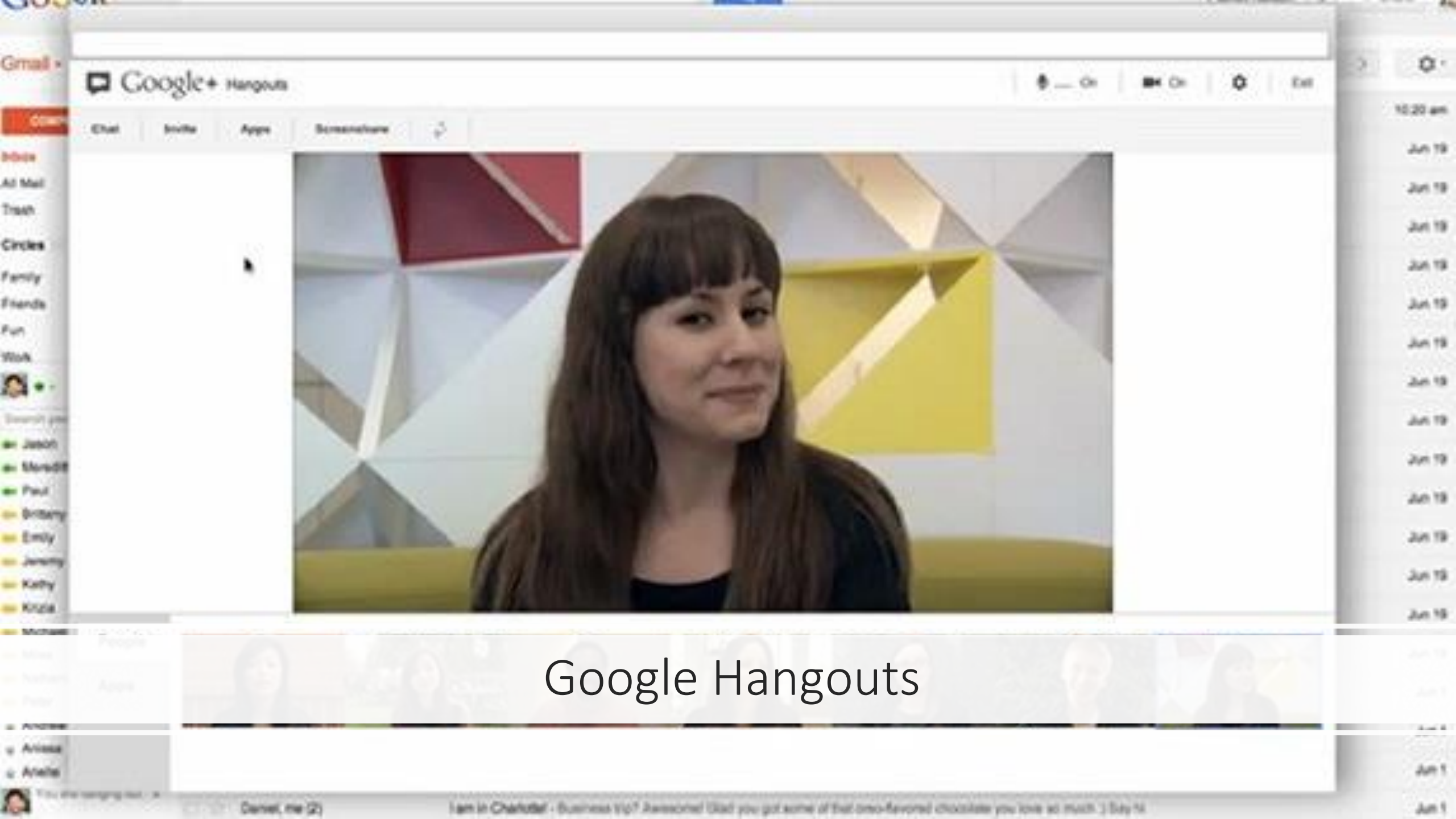
Go to Meeting



Go To Connect

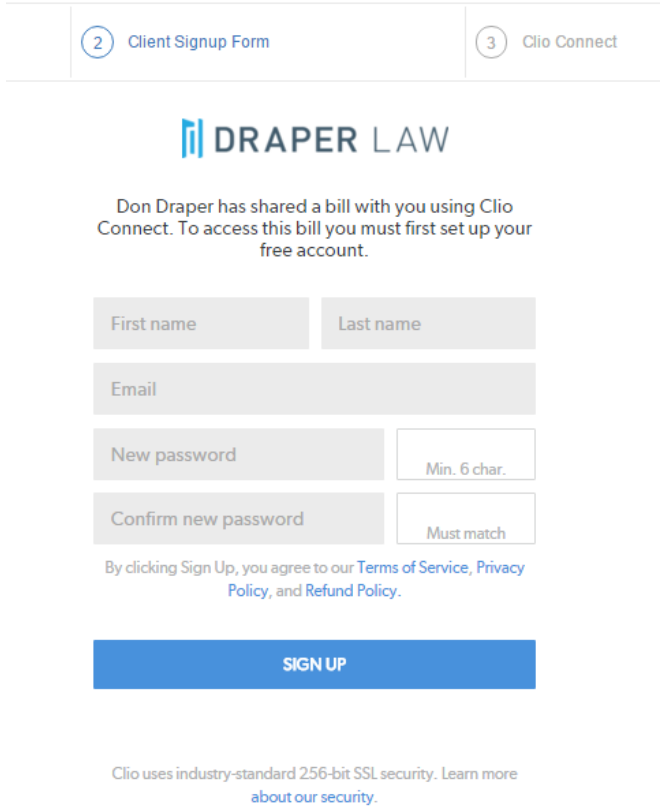


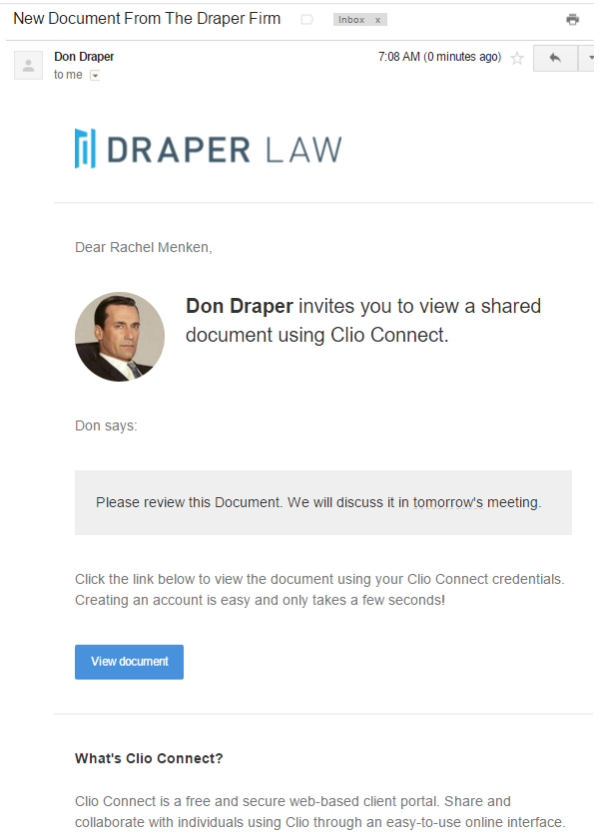
Microsoft Teams

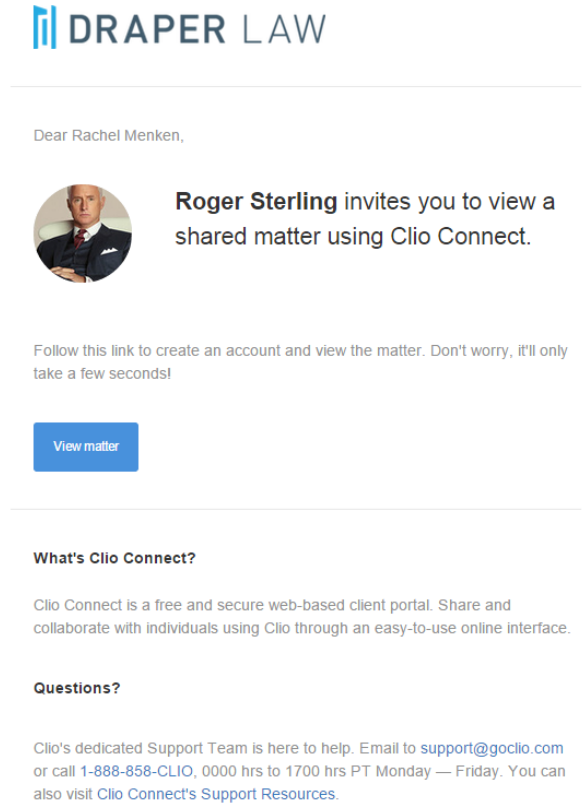


Google Hangouts

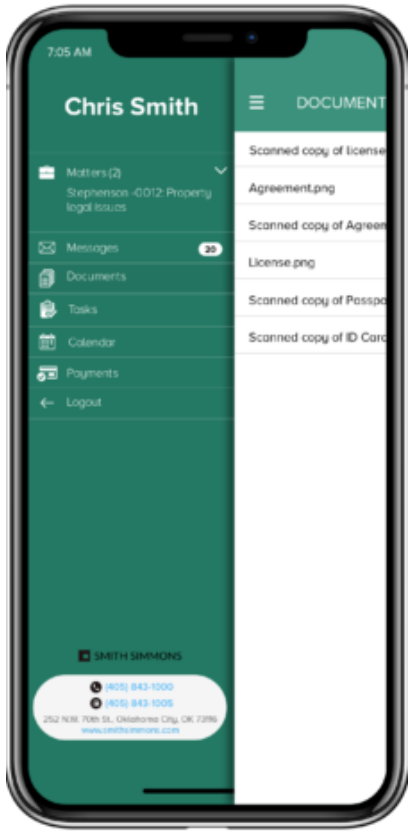
Client Portals

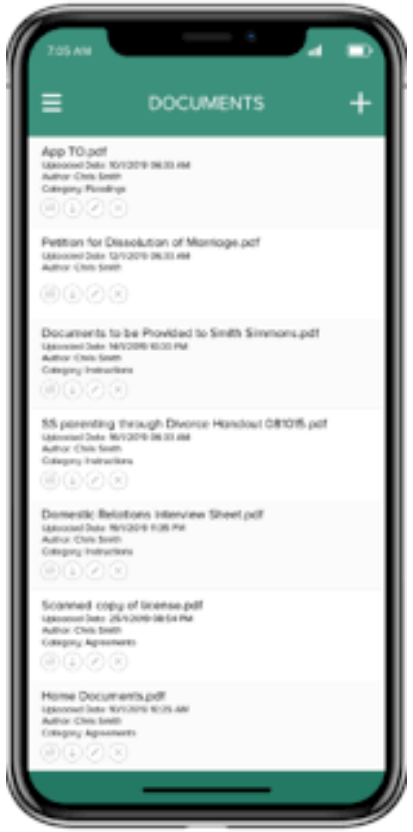






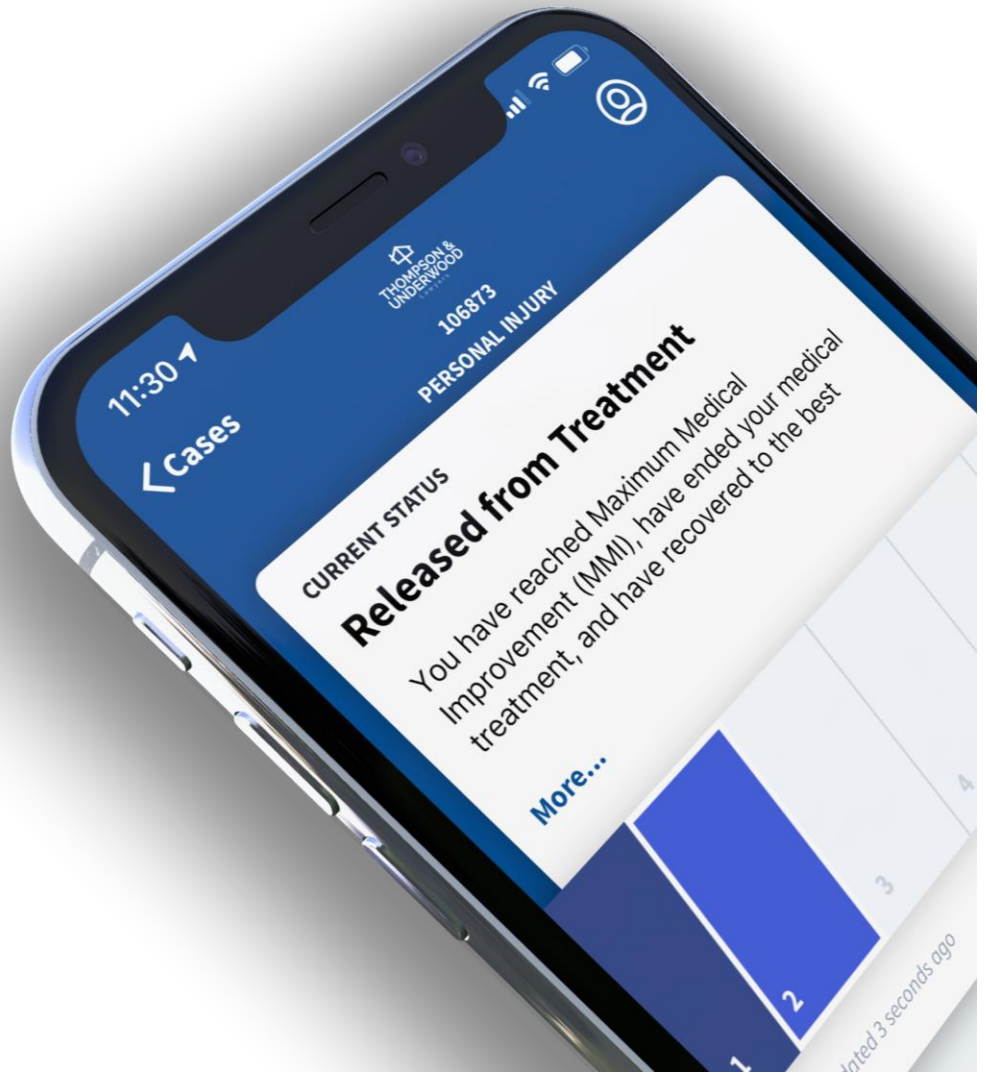
Clio Connect





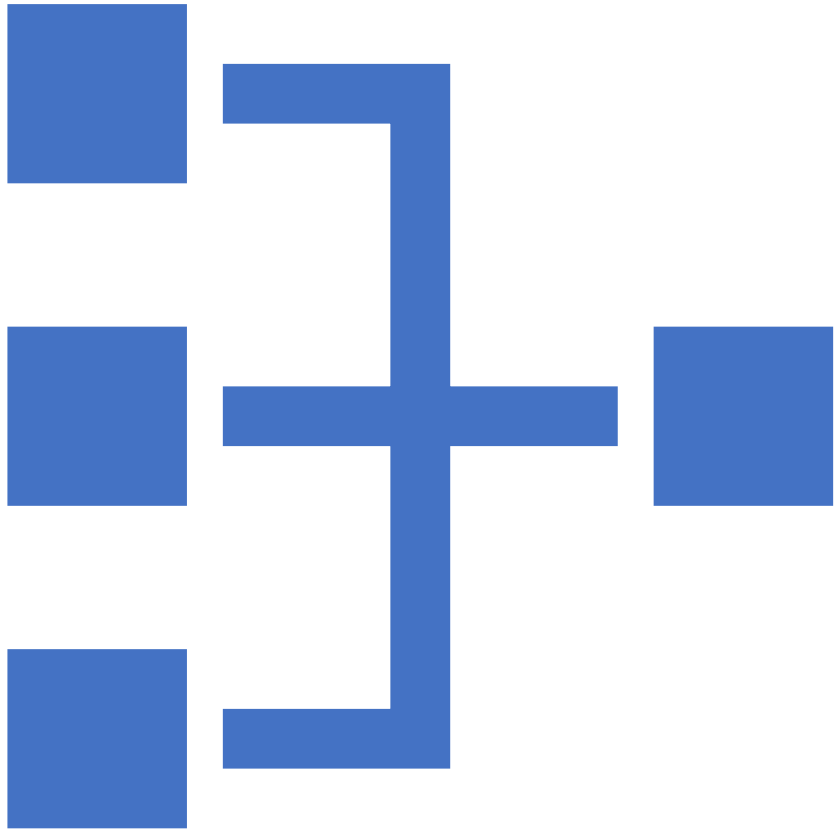
Your Firm App

Case Status


11:30
Cases
THOMPSON & UNDERWOOD
10687 3
PERSONAL INJURY
CURRENT STATUS
Released from Treatment
You have reached Maximum Medical Improvement (MMI), have ended your medical treatment, and have recovered to the best
More...
1
2
3
4

CRM Solultions

The difference between CRM and a Practice Management System



CRM Contact Types

- Lead
- Prospect
- Potential New Client
- Opportunity
- Won
- Lost
- Not a fit
- Client

Practice Management Contact Types

- Party
- Spouse
- Judge
- Mediator
- Expert Witness
- Child Custody Evaluator
- Insurance Adjustor
- Defendant
- Plaintiff

Clio Grow

ClientRock

LEADDOCKET

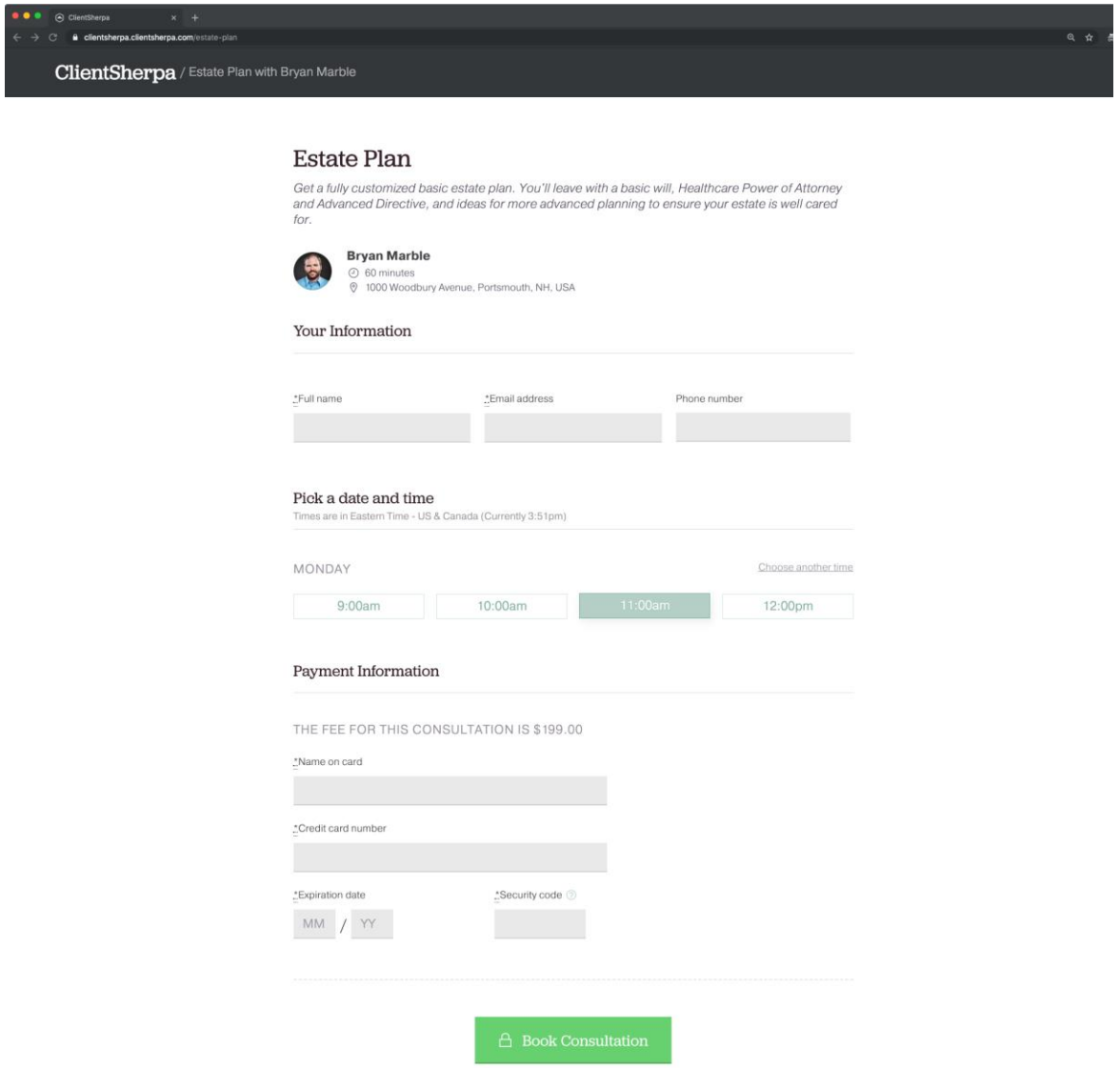
SIMPLE LEAD TRACKING FOR LAW FIRMS

Lawmatics

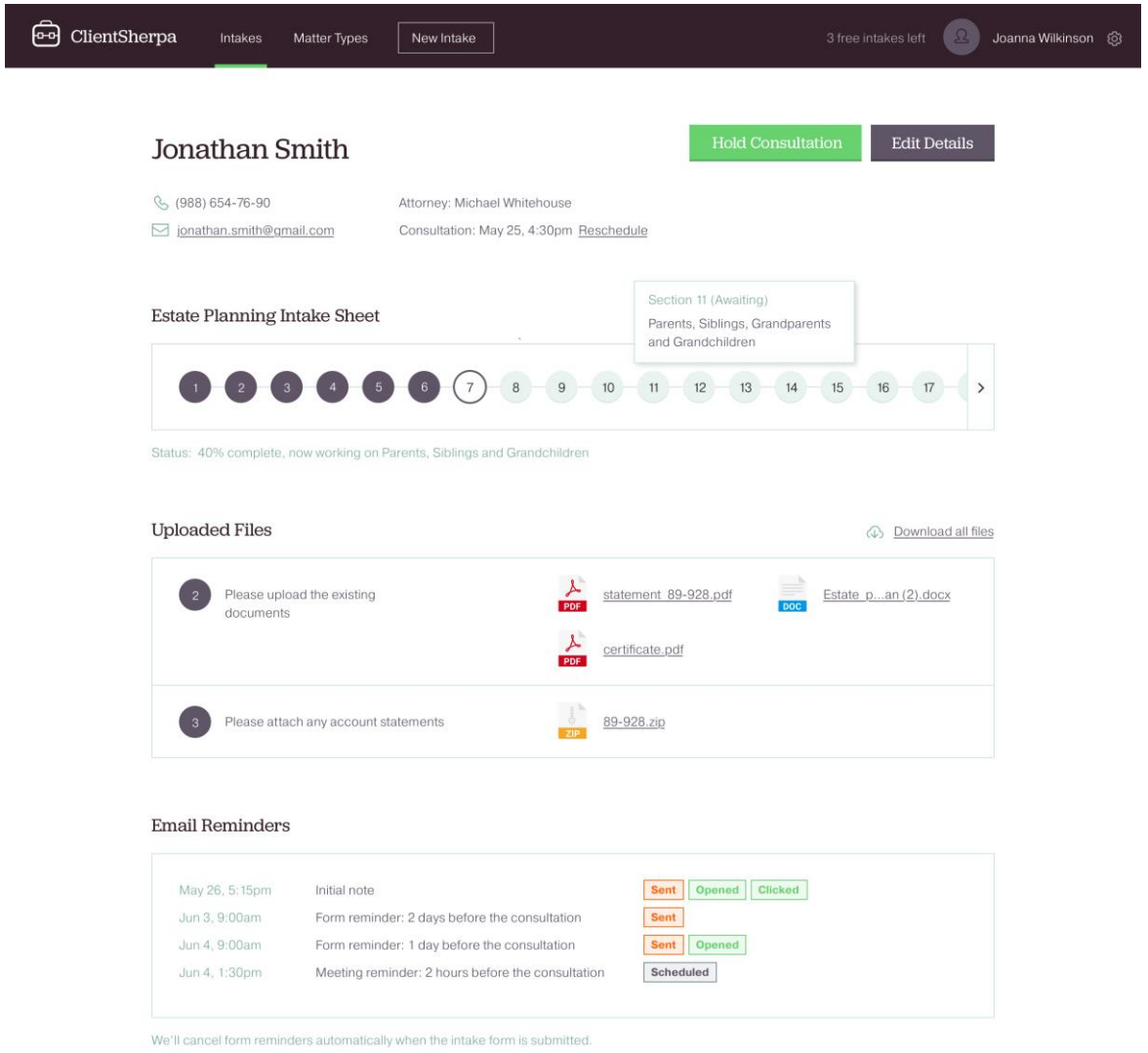
INTAKE & CRM SOLUTIONS

CREATE WORKFLOWS WITH FORMS + EMAIL + CALENDAR APPOINTMENTS + ESIGNATURE MORE.

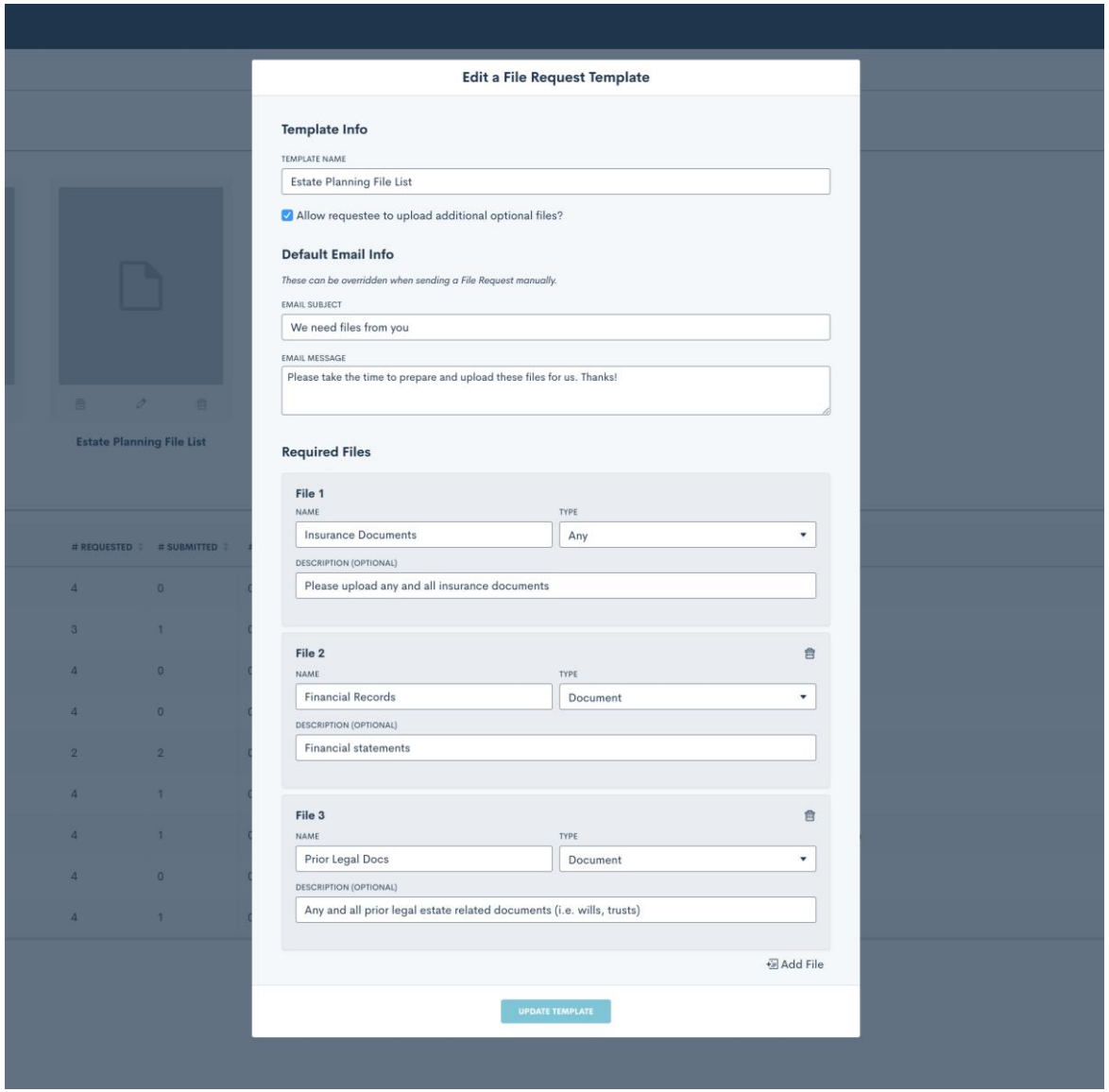
BOOKING WITH PAYMENT



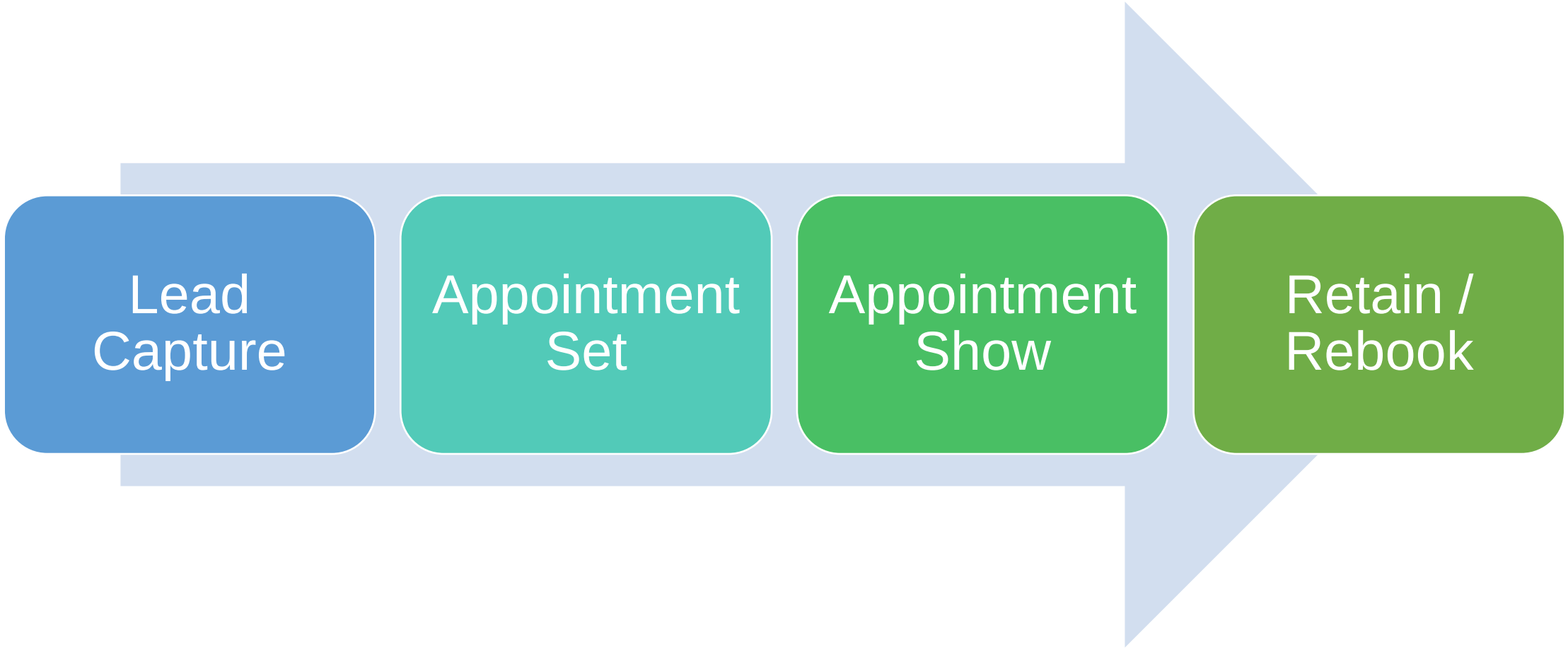
INTAKE PROGRESS



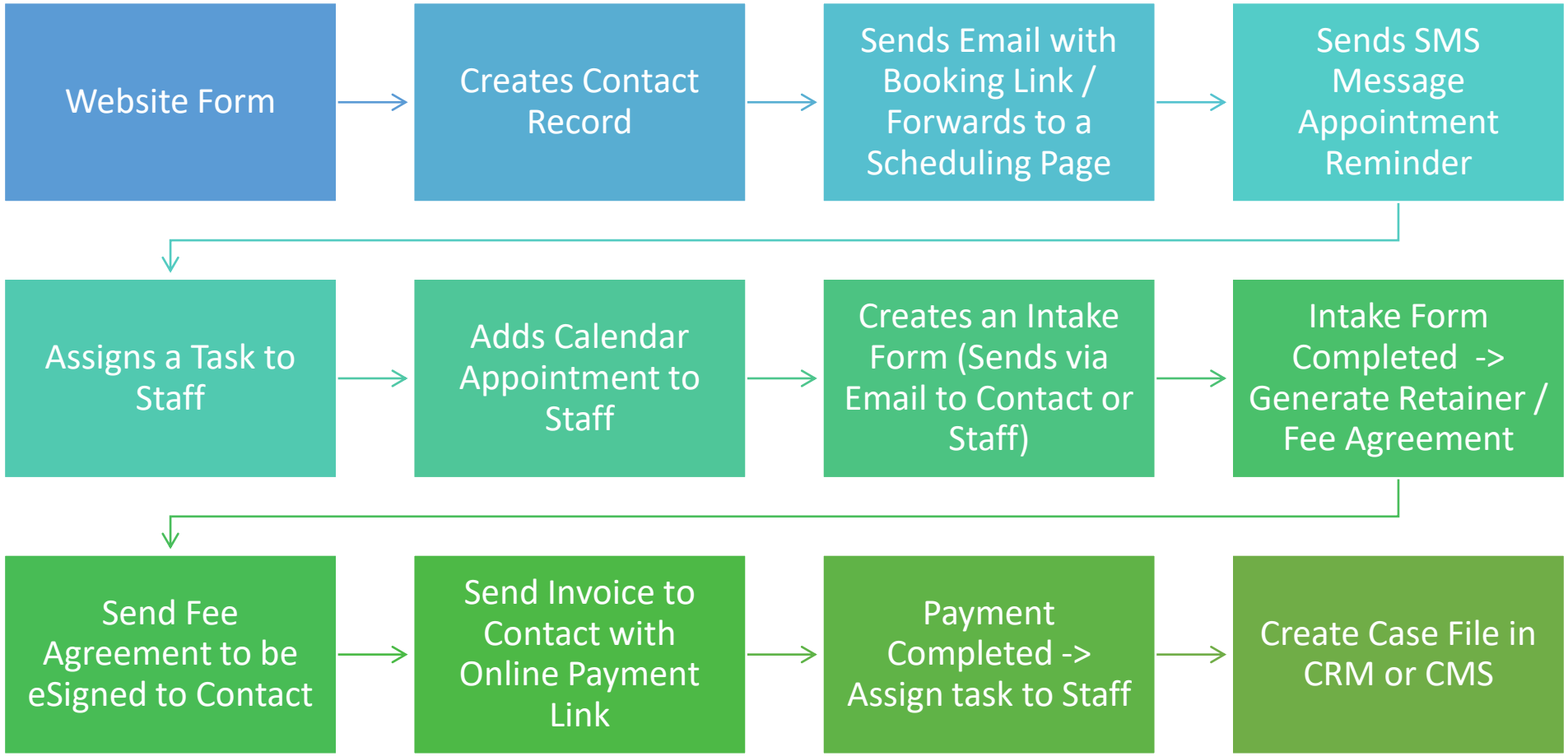
FILE REQUESTS



POTENTIAL NEW CLIENT (PNC)

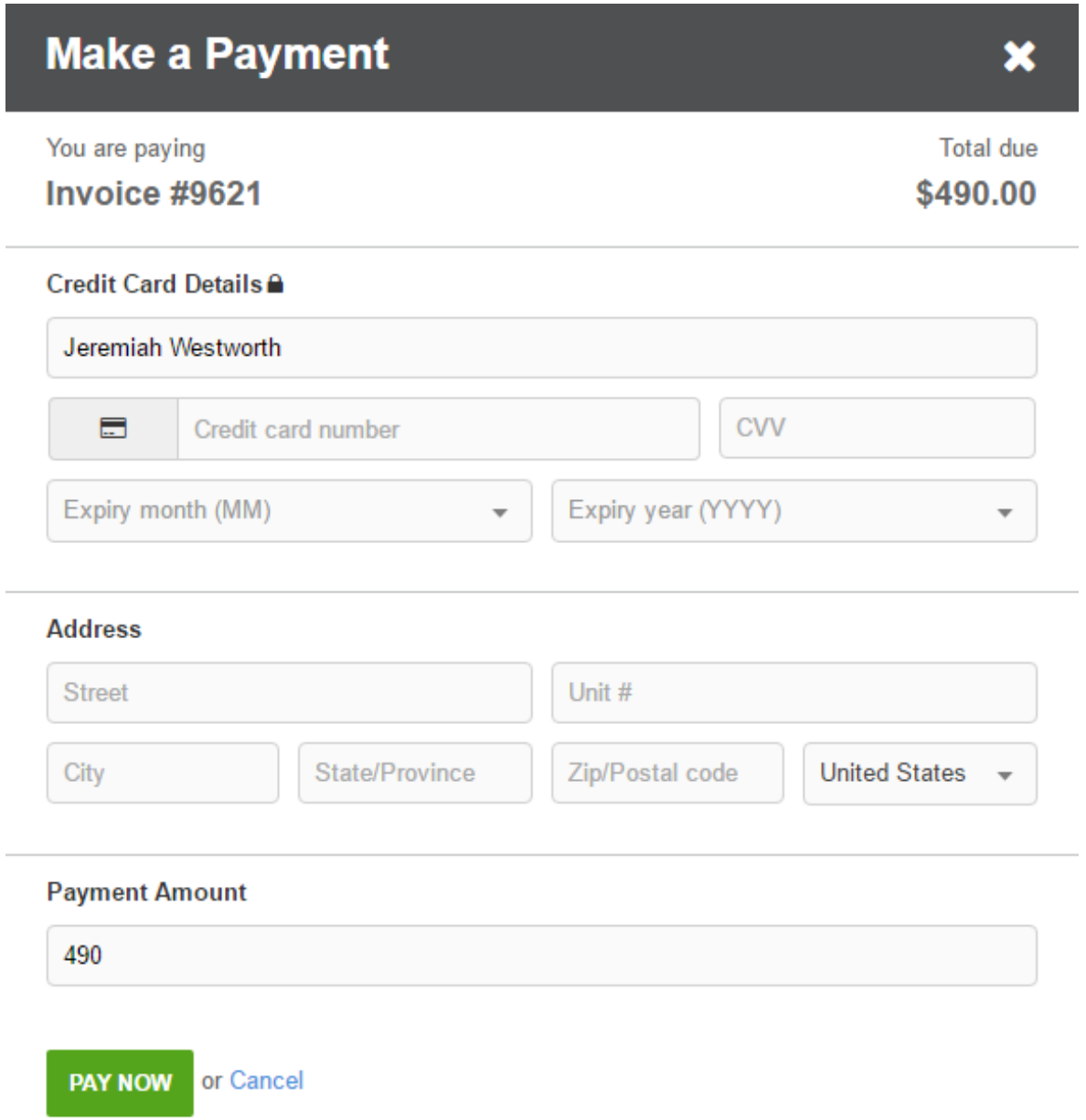


ADVANCED PNC AUTOMATION

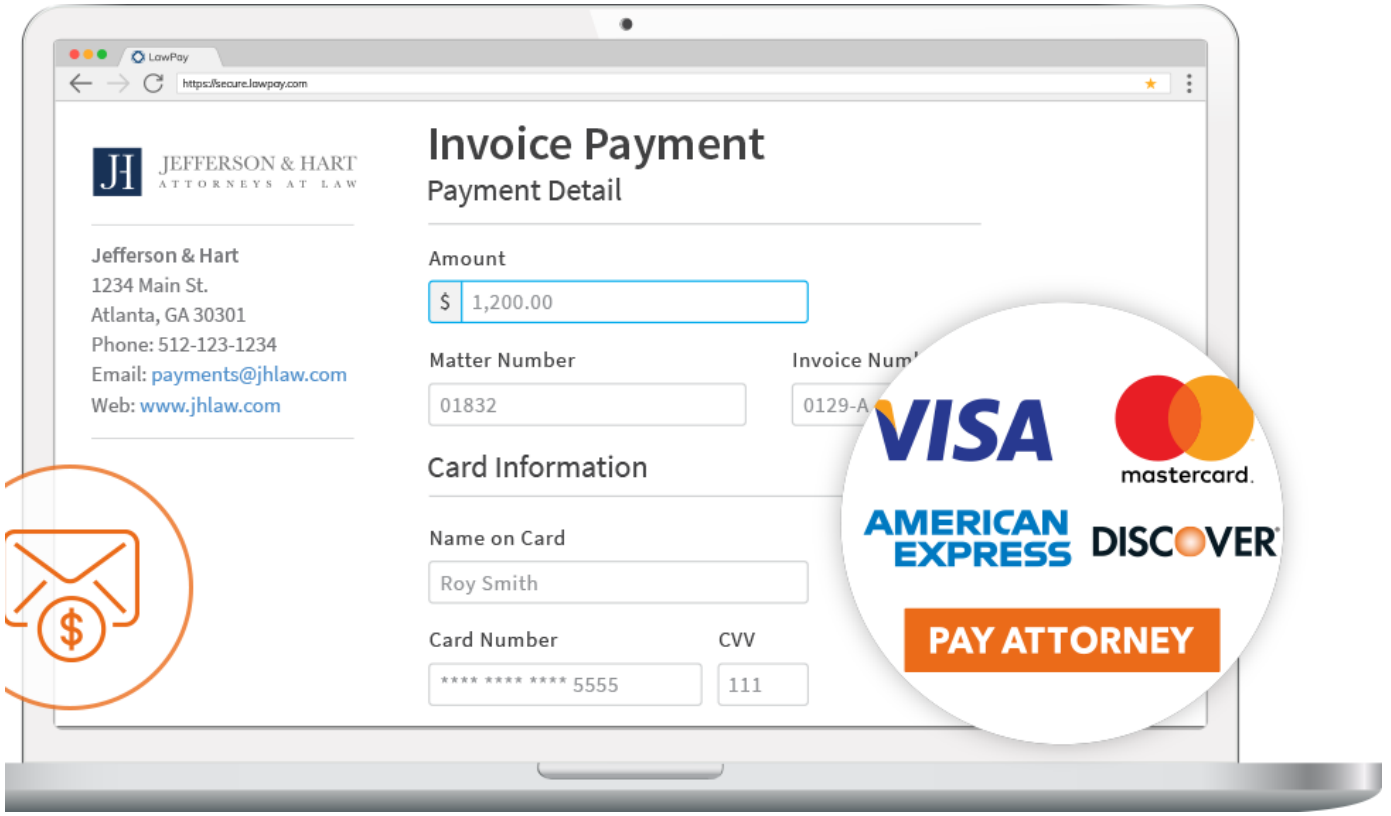


Electronic Payments

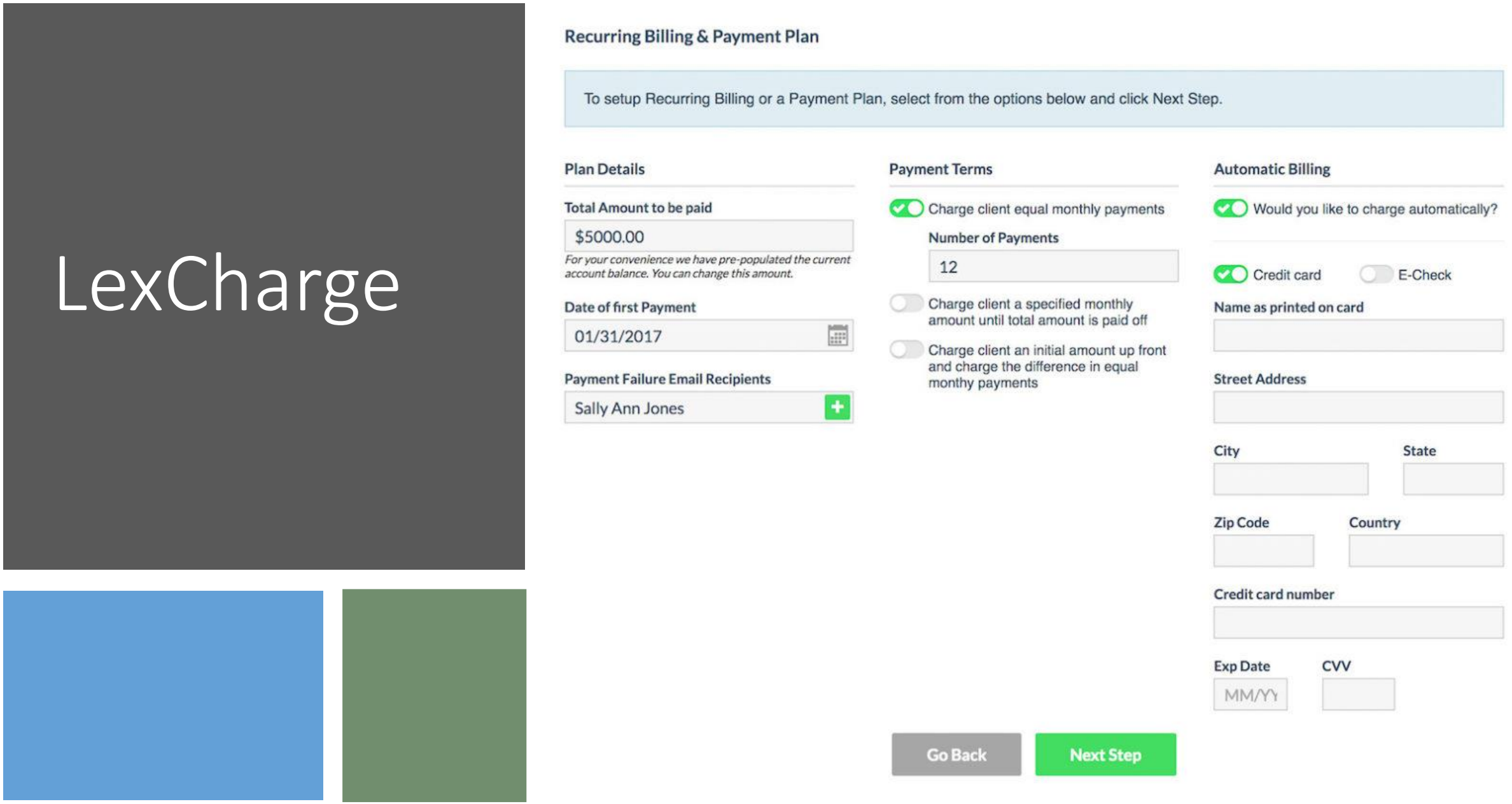
Clio Payments



LawPay


LawPay
https://secure.lawpay.com
JEFFERSON & HART
ATTORNEYS AT LAW
Jefferson & Hart
1234 Main St.
Atlanta, GA 30301
Phone: 512-123-1234
Email: payments@jhlaw.com
Web: www.jhlaw.com
Invoice Payment
Payment Detail
Amount
$ 1,200.00
Matter Number
01832
Invoice Num
0129-A
Card Information
Name on Card
Roy Smith
Card Number
**** **** **** 5555
CVV
111
VISA
mastercard.
AMERICAN EXPRESS
DISCOVER
PAY ATTORNEY

LexCharge


Recurring Billing & Payment Plan
To setup Recurring Billing or a Payment Plan, select from the options below and click Next Step.
Plan Details
Total Amount to be paid
$5000.00
For your convenience we have pre-populated the current account balance. You can change this amount.
Date of first Payment
01/31/2017
Payment Failure Email Recipients
Sally Ann Jones
Payment Terms
Charge client equal monthly payments
Number of Payments
12
Charge client a specified monthly amount until total amount is paid off
Charge client an initial amount up front and charge the difference in equal monthy payments
Automatic Billing
Would you like to charge automatically?
Credit card
E-Check
Name as printed on card
Street Address
City
State
Zip Code
Country
Credit card number
Exp Date
MM/YY
CVV
Go Back
Next Step

Q & A

Thank you!

- Chelsey Lambert
  - Chelsey@LegalTechMG.com
  - LexTechReview.com
  - LegalTechPublishing.com

Legal Tech Media Group

COLLABORATION AND COMMUNICATION RESOURCES CHEAT SHEET

Legal Tech Media Group

ONLINE MEETINGS

Zoom

https://zoom.us

GoToMeeting

https://www.gotomeeting.com

Jive

https://jive.com/

WEBINARS

Zoom

https://zoom.us

Go to Webinar

https://www.gotomeeting.com/webinar

TEAM COLLABORATION

Slack

https://slack.com

Microsoft Teams

https://products.office.com/en-us/microsoft-teams/group-chat-software

Google Hangouts

https://gsuite.google.com/products/meet/

EMAIL MARKETING & AUTOMATION

HubSpot

https://www.hubspot.com

Active Campaign

https://www.activecampaign.com

EMAIL MARKETING & AUTOMATION cont

Convert Kit

https://convertkit.com

Mailchimp

https://mailchimp.com