



Legal Tech Media Group



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.

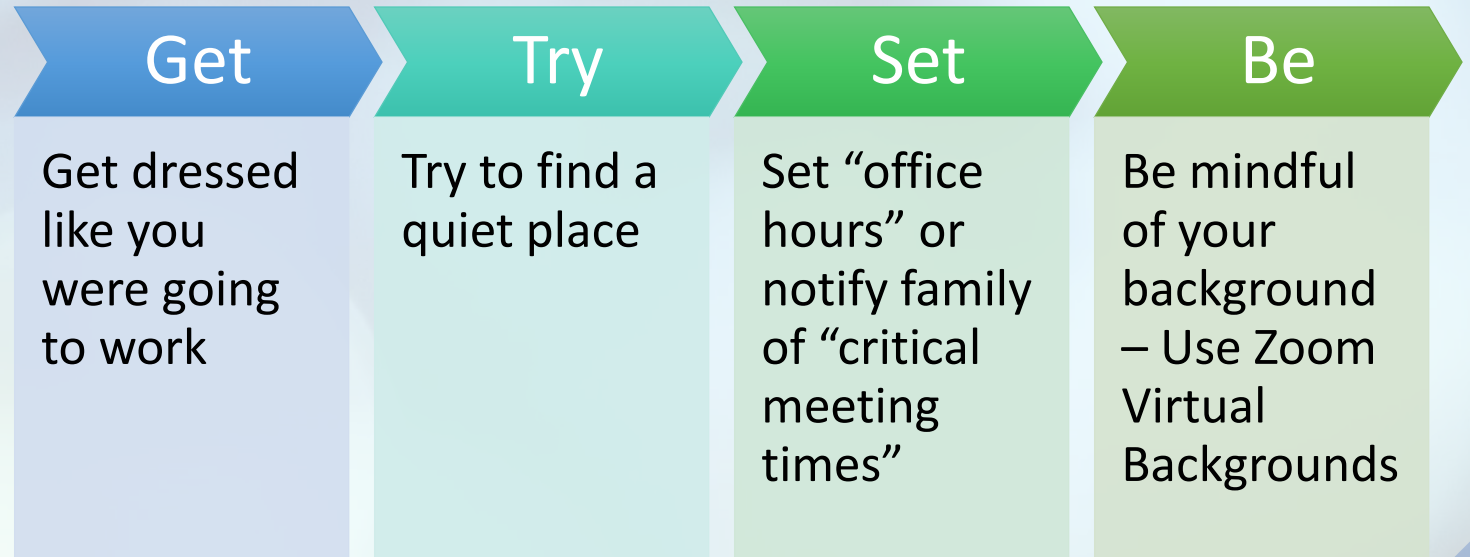
Setting Expectations

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



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   

I have a green screen ?

Add Image
Add Video

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

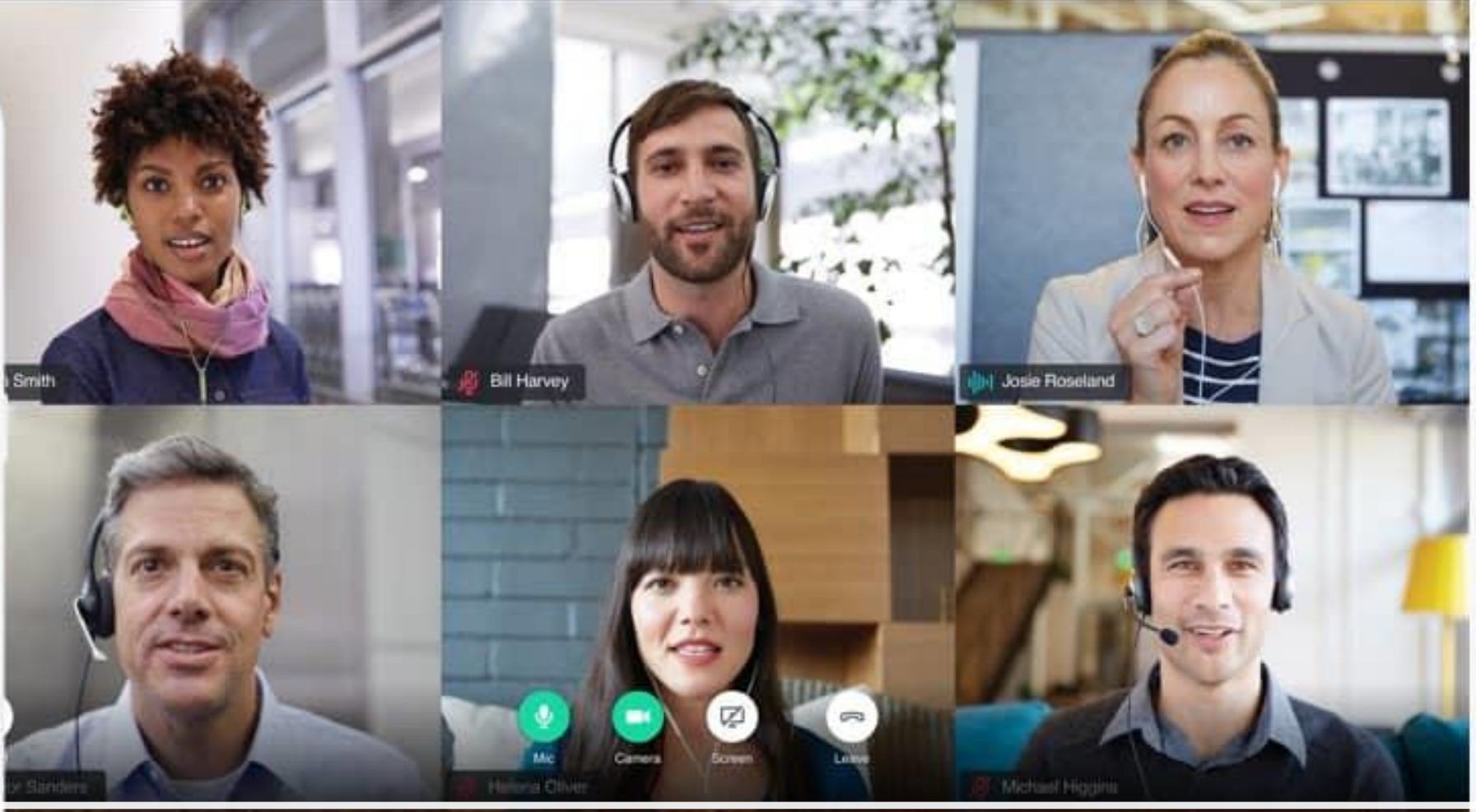
Q zoom background X

Home > Templates > Zoom Background

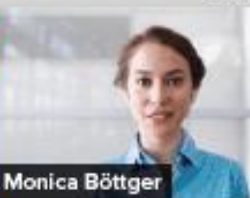
Zoom Background templates

Browse high quality Zoom Background templates for your next design





Go to Meeting



INVITE

Organizer



Attendee



Go To Connect

Search or type a command

Adventure Works Cycles > Recruiting Events

Private Confidential

Conversations Files Best Practices Event Logistics Event Site Info +

Tracy Salinas 1:21 PM
Here is the presentation that we plan on showing at the start of the event. Please take a look at this deck and suggest edits.

Recruiting Presentation.pptx

- Collapse all

Tracy Salinas 1:21 PM
Daniela, could you take a look at this recruiting presentation and see if we need to make any edits or additions?

Daniela Madera 1:24 PM
I think this is looking good, Amanda, do you have any input on the recruiting presentation deck?

Very nice visual design approach and on brand!

Tracy Salinas 1:25 PM
Daniela, thanks! Team effort. 🙌

Amanda Johnson 1:25 PM
We should update the benefits section with the recent additions. We'll have an Excel Spreadsheet available soon.

Reply

Amanda Johnson 2:10 PM
Tracey and Daniela, here is the updated Excel benefits spreadsheet.

Revised Benefits

Reply

Luis Valdez 2:30 PM
Amanda, can you share a recap of last year's event with my team?

Start a new conversation



Microsoft Teams



Client Portals



Don Draper has shared a bill with you using Clio Connect. To access this bill you must first set up your free account.

First name	Last name
Email	
New password	Min. 6 char.
Confirm new password	Must match

By clicking Sign Up, you agree to our [Terms of Service](#), [Privacy Policy](#), and [Refund Policy](#).

SIGN UP

Clio uses industry-standard 256-bit SSL security. [Learn more about our security.](#)

Don Draper to me 7:08 AM (0 minutes ago)



Dear Rachel Menken,



Don Draper invites you to view a shared document using Clio Connect.

Don says:

Please review this Document. We will discuss it in tomorrow's meeting.

Click the link below to view the document using your Clio Connect credentials. Creating an account is easy and only takes a few seconds!

View document

What's Clio Connect?

Clio Connect is a free and secure web-based client portal. Share and collaborate with individuals using Clio through an easy-to-use online interface.



Dear Rachel Menken,



Roger Sterling invites you to view a shared matter using Clio Connect.

Follow this link to create an account and view the matter. Don't worry, it'll only take a few seconds!

View matter

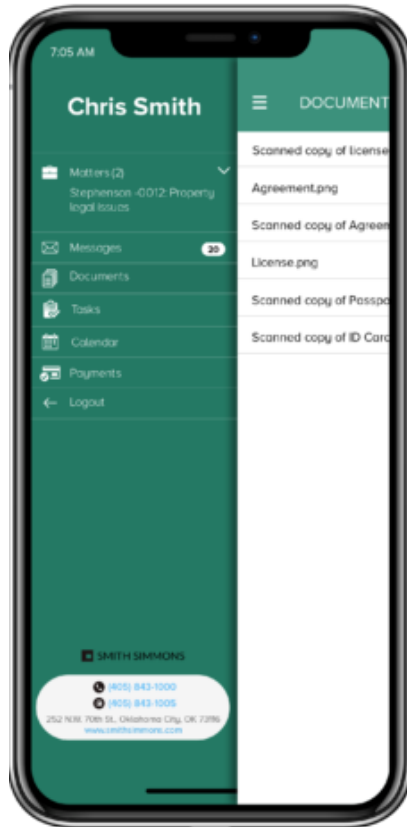
What's Clio Connect?

Clio Connect is a free and secure web-based client portal. Share and collaborate with individuals using Clio through an easy-to-use online interface.

Questions?

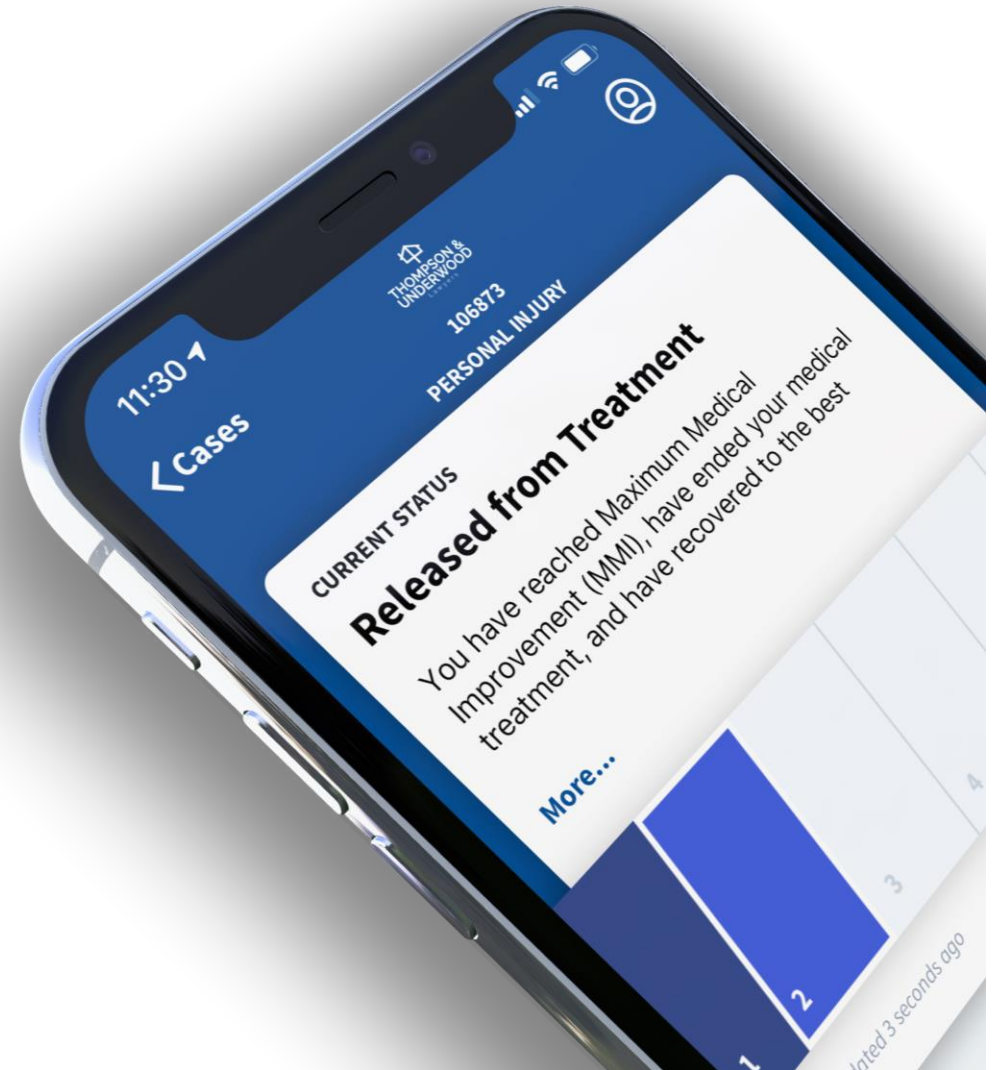
Clio's dedicated Support Team is here to help. Email to support@goclio.com or call 1-888-858-CLIO, 0000 hrs to 1700 hrs PT Monday — Friday. You can also visit [Clio Connect's Support Resources](#).

Clio Connect



Your Firm App

Case Status

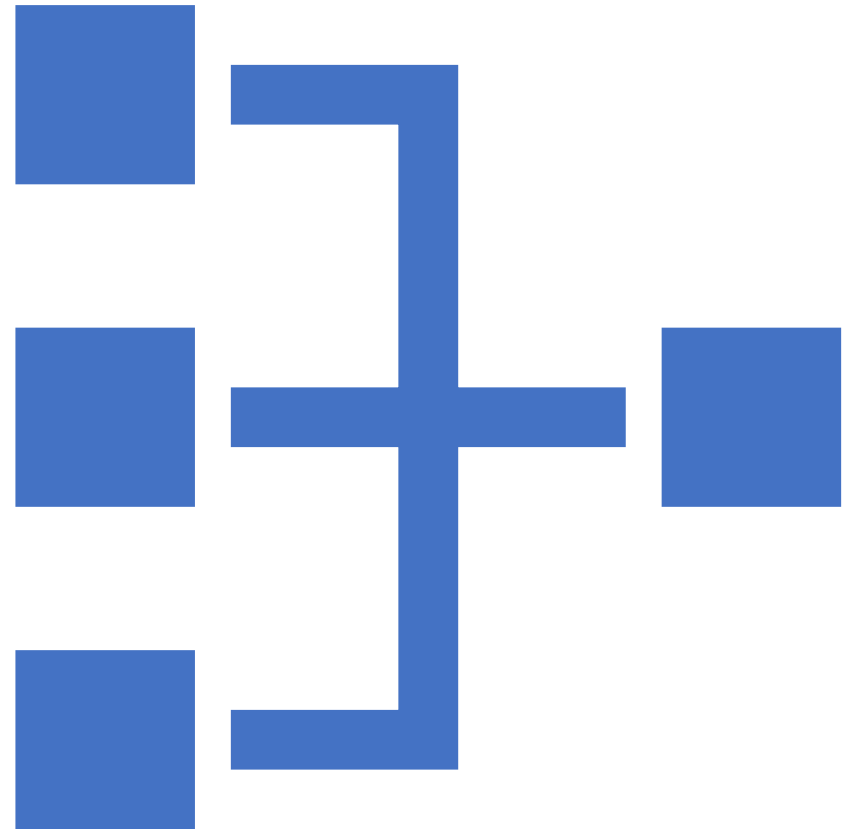




CRM Solutions





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

ClientSherpa / Estate Plan with Bryan Marble

Estate Plan

Get a fully customized basic estate plan. You'll leave with a basic will, Healthcare Power of Attorney and Advanced Directive, and ideas for more advanced planning to ensure your estate is well cared for.

 **Bryan Marble**
60 minutes
1000 Woodbury Avenue, Portsmouth, NH, USA

Your Information

Full name Email address Phone number

Pick a date and time
Times are in Eastern Time - US & Canada (Currently 3:51pm)

MONDAY [Choose another time](#)

9:00am 10:00am 11:00am 12:00pm

Payment Information


THE FEE FOR THIS CONSULTATION IS \$199.00

Name on card

Credit card number

Expiration date Security code

MM / YY

 Book Consultation

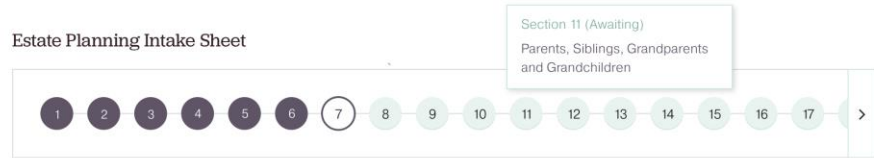
INTAKE PROGRESS

Jonathan Smith

Hold Consultation Edit Details

(988) 654-76-90 Attorney: Michael Whitehouse
jonathan.smith@gmail.com Consultation: May 25, 4:30pm Reschedule

Estate Planning Intake Sheet



Status: 40% complete, now working on Parents, Siblings and Grandchildren

Uploaded Files

Download all files

2	Please upload the existing documents	statement_89-928.pdf	Estate_p...an(2).docx
		certificate.pdf	
3	Please attach any account statements	89-928.zip	

Email Reminders

May 26, 5:15pm	Initial note	Sent	Opened	Clicked
Jun 3, 9:00am	Form reminder: 2 days before the consultation	Sent		
Jun 4, 9:00am	Form reminder: 1 day before the consultation	Sent	Opened	
Jun 4, 1:30pm	Meeting reminder: 2 hours before the consultation	Scheduled		

We'll cancel form reminders automatically when the intake form is submitted.

FILE REQUESTS

Edit a File Request Template

Template Info

TEMPLATE NAME
Estate Planning File List

Allow requestee to upload additional optional files?

Default Email Info

These can be overridden when sending a File Request manually.

EMAIL SUBJECT
We need files from you

EMAIL MESSAGE
Please take the time to prepare and upload these files for us. Thanks!

Required Files

File 1

NAME: Insurance Documents TYPE: Any

DESCRIPTION (OPTIONAL): Please upload any and all insurance documents

File 2

NAME: Financial Records TYPE: Document

DESCRIPTION (OPTIONAL): Financial statements

File 3

NAME: Prior Legal Docs TYPE: Document

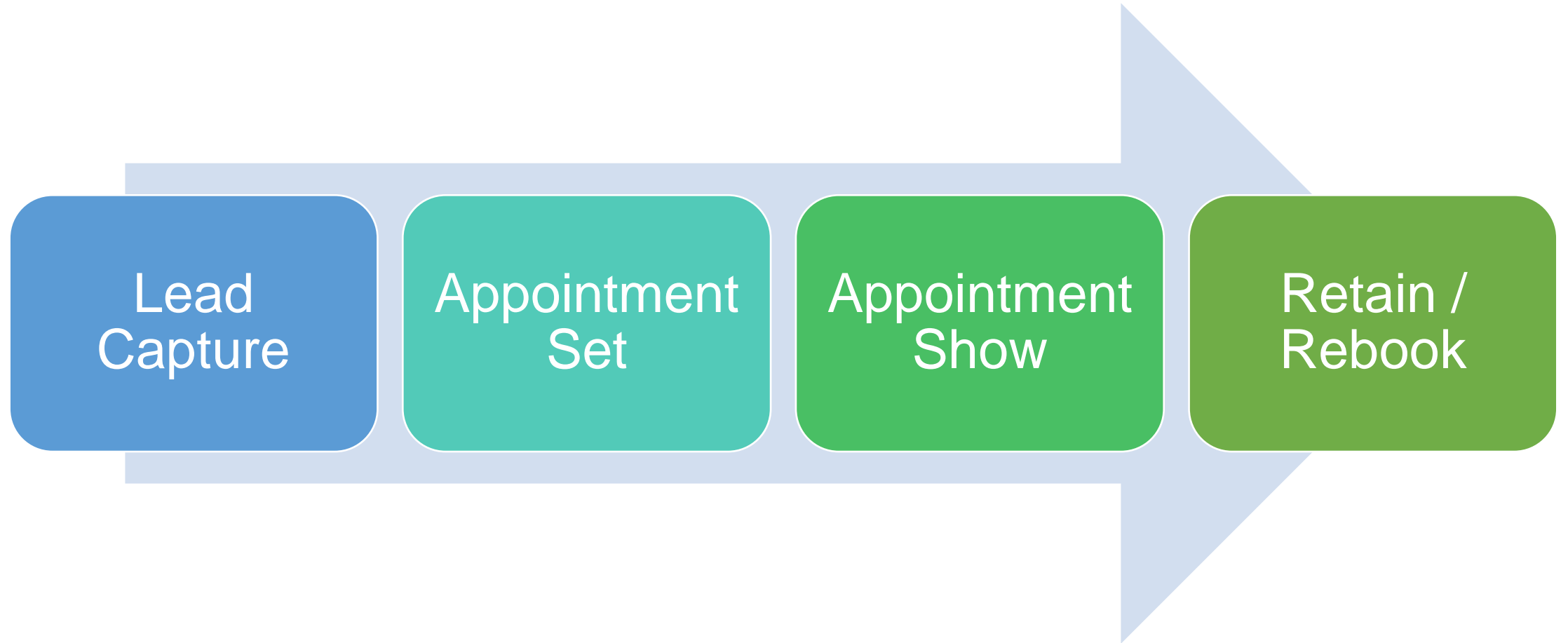
DESCRIPTION (OPTIONAL): Any and all prior legal estate related documents (i.e. wills, trusts)

[Add File](#)

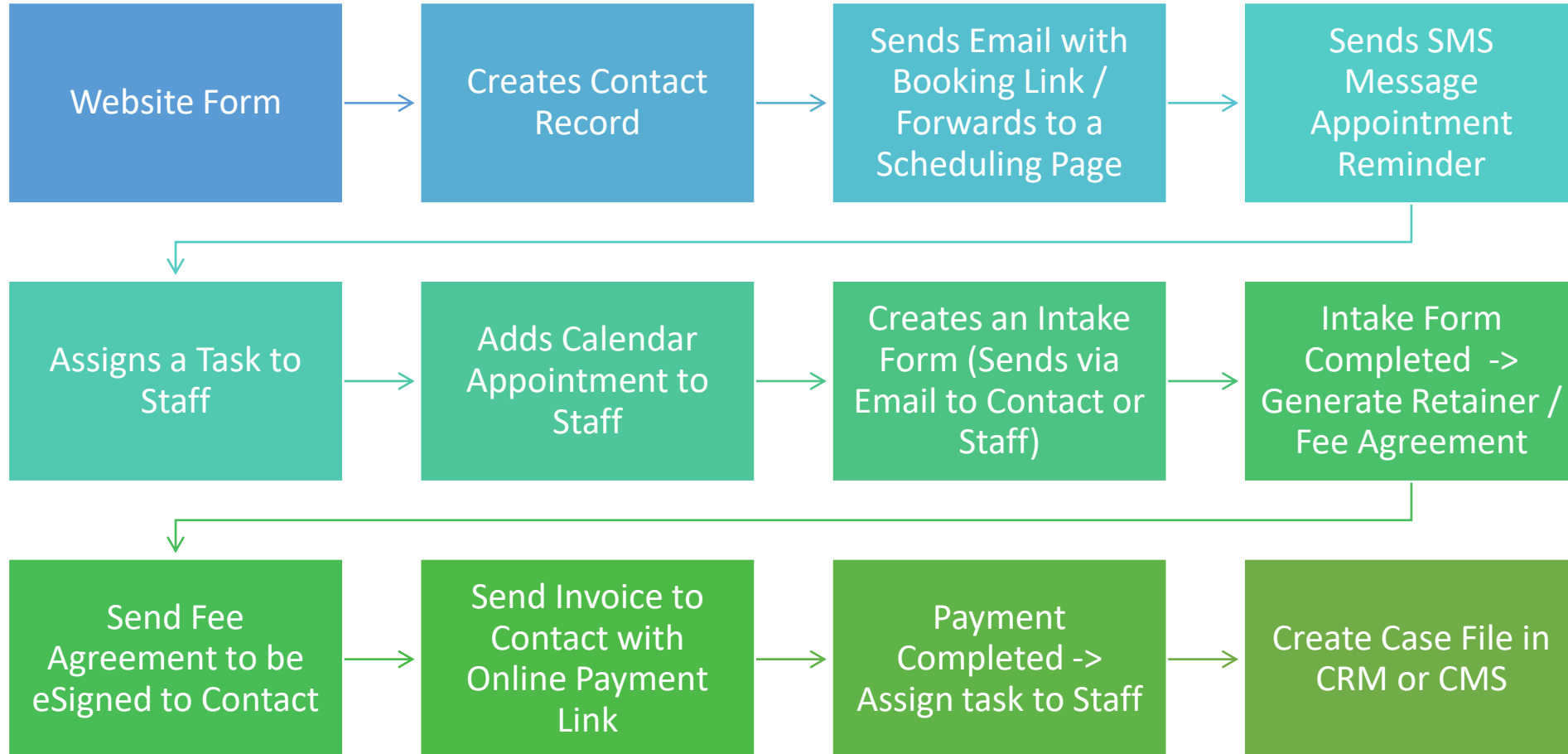
[UPDATE TEMPLATE](#)

# REQUESTED	# SUBMITTED
4	0
3	1
4	0
4	0
2	2
4	1
4	1
4	0
4	1

POTENTIAL NEW CLIENT (PNC)



ADVANCED PNC AUTOMATION





Electronic Payments

Clio Payments

Make a Payment



You are paying

Invoice #9621

Total due

\$490.00

Credit Card Details

Jeremiah Westworth



Credit card number

CVV

Expiry month (MM) ▼

Expiry year (YYYY) ▼

Address

Street

Unit #

City

State/Province

Zip/Postal code

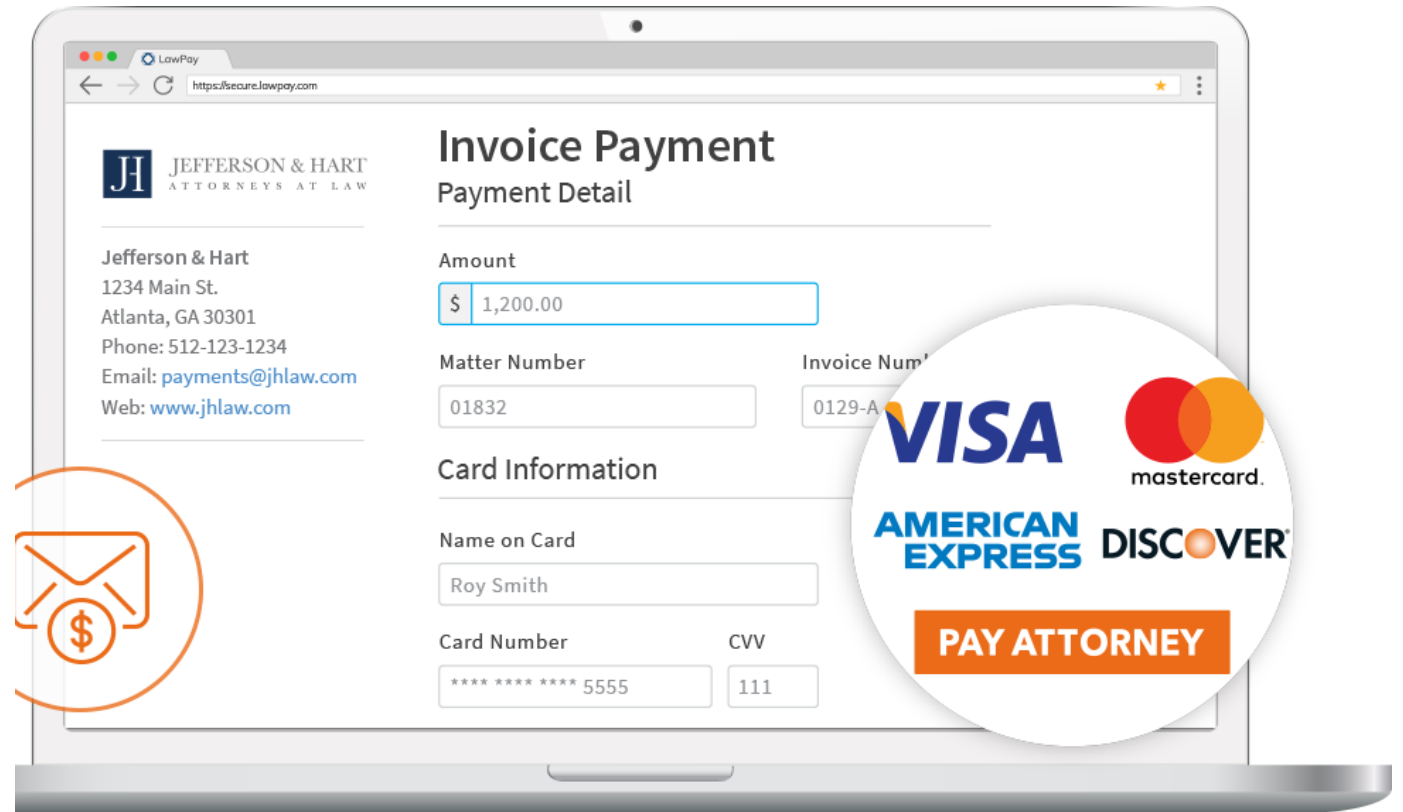
United States ▼

Payment Amount

490

PAY NOW or [Cancel](#)

LawPay



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 monthly 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

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>



[ActiveCampaign >](#)



EMAIL MARKETING & AUTOMATION cont

Convert Kit

<https://convertkit.com>



Mailchimp

<https://mailchimp.com>

