



## Power users

*Tech-savvy lawyers reveal the tools that boost their productivity.*

By James Careless

**T**here are many, many companies trying to sell cutting-edge technology to the Canadian legal profession. But what do real lawyers use in their day-to-day lives? *National* magazine contacted three technologically adept lawyers to find out.

### Donna Neff: power user

There is a term that computer professionals use to describe someone as tech-savvy as Ottawa lawyer Donna Neff: power user. A power user is someone who gets the most from their computer technology; regularly relying

on cutting-edge applications that most people aren't even aware of.

A case in point: The principal of Neff Law Office Professional Corporation uses a Livescribe Pulse recording pen to record audio as she takes notes. Since Neff writes on special Livescribe paper, the pen is able to automatically replay whatever audio was being recorded when a certain word was written. All Neff has to do is touch the pen on the specific written word, and the onboard audio recorder replays the associated audio.

**“My goal is to travel as lightly as I can. This is why I carry the technology that I do.”**

— Christopher Pike, Benson Myles, PLC, St. John's, Nfld.

“I use the Livescribe in estate planning meetings, where complex details are being covered,” she says. “I can then review what was actually said by using my notes, ensuring that I get things right. I can also transfer the Livescribe audio recordings as .WAV files to my PC. I can then input these files into my Dragon NaturallySpeaking voice recognition software.” She is working on “training” the program to recognize how she speaks and provide her with accurate transcriptions.

There are two flat panel monitors on Neff's desk. “Using two monitors

allows me to put whatever research I am accessing on one screen, while I write to the other,” she explains. “Two monitors allow you to mimic how you work with paper in the physical world. Providing every team member with two monitors increases efficiency and is essential to the success of a paperless office.”

For scanning documents out of the office, Neff relies on a very portable Neat scanner. “The Neat scanner allows me to copy whatever paper I am given into an electronic file,” she says. “I connect it to my Acer Aspire netbook — backed up by a small Western Digital 500GB portable hard drive.” At the office, she employs a Fujitsu S1500 ScanSnap for her scanning needs, which are many in a paperless office. The ScanSnap was particularly attractive as a desktop scanner since it came bundled with Adobe Acrobat software, another must for a paperless office.

Neff's goal is to harness technology wherever possible, to make her law office run more efficiently and accurately. To this end, she has been using the latest versions of Adobe Acrobat to convert PDFs and Word documents into electronic format. “We are striving to put our forms on the Web in a fillable format; at present,

## Avocats techno-sapiens

*Les avocats calés en technologie révèlent les outils qui stimulent leur productivité.*

Quelles technologies de pointe les avocats utilisent-ils quotidiennement? *National* a interrogé trois avocats férus des technologies à ce sujet.

### Donna Neff : pro technologique

Une pro de la technologie, l'avocate principale chez Neff Law, Donna Neff, exploite les ordinateurs au maximum. Elle utilise le stylo enregistreur Livescribe Pulse qui effectue un enregistrement audio pendant qu'elle prend des notes sur un papier spécial. M<sup>e</sup> Neff utilise cet instrument pour couvrir des réunions complexes concernant la planification de succession. Cela lui permet de revoir ses notes en s'assurant de leur fiabilité. Elle peut aussi transférer sur ordinateur les enregistrements audio Livescribe en tant que fichiers WAV, puis transposer ces derniers dans le logiciel de reconnaissance vocale Dragon NaturallySpeaking.

M<sup>e</sup> Neff utilise deux écrans plats à la fois. Le concept est d'afficher l'information sur un écran et d'écrire sur l'autre, de manière à assurer le succès de son bureau sans papier. Dans la même veine, M<sup>e</sup> Neff emploie Neat, un scanner portatif, en plus de Fujitsu S1500 ScanSnap pour numériser tout document. Elle relie ce numériseur à son miniportable ACER, le tout étant sauvegardé sur son disque dur externe de 500 GB.

En bref, M<sup>e</sup> Neff souhaite exploiter la technologie autant que possible pour plus d'efficacité et de précision : fichiers en format PDF, formulaires électroniques modifiables, applications Amicus Attorney et HotDocs et réseau privé virtuel VPN pour permettre le travail à distance. Grâce à la technologie, M<sup>e</sup> Neff peut améliorer la productivité de son organisation sans accroître son personnel.

### Cory Furman : un branché

Cory Furman croit fermement au droit technologique. Associé chez MacPherson Leslie & Tyerman LLP (MLT) à Regina, Saskatchewan, M<sup>e</sup> Furman a récemment intégré le groupe de pratique consacré à la propriété intellectuelle (PI), aux brevets d'invention et aux marques du cabinet.

Il fait remarquer que cela fait 12 ans que MLT utilise la plateforme de logiciels ProLaw et que le cabinet envisage un transfert à une nouvelle plateforme PI personnalisée pour accroître l'efficacité du groupe.

M<sup>e</sup> Furman juge la sauvegarde et la disponibilité essentielles. Il utilise quotidiennement Dragon NaturallySpeaking depuis longtemps, ce qui lui permet de créer des textes en dictant le contenu à partir d'un casque.

En déplacement, M<sup>e</sup> Furman compte sur un miniportable puissant Dell XPS de 8 gigs de RAM capable de recevoir Dragon NaturallySpeaking. Il possède également un Blackberry Tour smartphone agrémenté du programme d'enregistrement vocal VR+, qui lui permet de dicter ses messages à son assistant sur son BlackBerry, qui les transfère directement à sa messagerie électronique.

M<sup>e</sup> Furman n'utilise pas de casque d'écoute Bluetooth; il privilégie un casque Logitech avec fil plus économique. Il utilisait des casques sans fil d'une valeur de 80 à 90 \$, mais il les oubliait constamment lorsqu'il les traînait à l'extérieur du bureau et devait les racheter. D'où son choix de porter un casque qu'il ne risque pas d'oublier pendant qu'il trône sur sa tête.

### Christopher Pike : guerrier de la route

Christopher Pike est avocat chez Benson Myles PLC à St. John's, à Terre-Neuve. Spécialiste en déclaration de sinistre

pour véhicule à moteur, il passe beaucoup de temps loin du bureau. Son BlackBerry 8830 et son MacBook Pro l'accompagnent partout.

Il utilise Word autant pour son PC que son MacBook. Il utilise la version régulière Windows Remote Desktop Client sur son MacBook pour se connecter sur PC au bureau à partir de toute connexion Internet. Le télétravail devient alors possible, tout en permettant la conservation des données stockées sur les serveurs du cabinet.

M<sup>e</sup> Pike apprécie considérablement Excel. Il l'utilise pour calculer les dommages et modéliser les résultats durant la négociation d'ententes. Il l'emploie aussi durant les médiations.

L'avocat utilise également Dragon NaturallySpeaking. Microsoft Outlook est le système de messagerie qu'il emploie, en plus des deux outils Outlook SpeedFiler et NEO. SpeedFiler classe les messages auxquels vous répondez et les missives sortantes dans un dossier désigné. Le programme permet de classer intuitivement ses messages dans un dossier par client et dans un sous-dossier par sujet.

Quant à NEO, il permet d'effectuer une recherche rapide et aisée dans tous les messages stockés en filtrant la recherche par sujet complet, date et correspondant.

L'avocat installera bientôt le logiciel de voix sur IP de Benson Myles sur son MacBook. Ses appels en ligne plutôt qu'au moyen de son cellulaire génèrent des économies.

M<sup>e</sup> Pike envisage d'utiliser iPad ou Plastic Logic Que pour plus de convivialité et rendre son défilement de documents électroniques plus facile et agréable. Il utilise le livre électronique de Sony depuis trois ans. **N**

— Yasmina El Jamaï

they are static documents which clients must print and fill out," she says. "Once our forms are fillable, our clients can complete them online and send them back to us. This will improve accuracy, reduce input time at our end, and generally allow us to provide better service."

The Neff Law Office also uses Amicus Attorney (file and contact management, docketing, calendar and messaging) and HotDocs (document drafting and assembly). Since her office

went paperless several years ago, all documents are scanned upon arrival. Going paperless and having these software applications in place has made it easy for staff members to access all of the information that they need to work away from the office in real-time, using secure VPN (Virtual Private Network) connections over the Internet.

"We've had Amicus Attorney for the past 10 years and love it," Neff says. "We docket in it, keep track of calendar

matters, contacts and telephone messages. It also connects directly to our PCLaw accounting software, which reduces the duplication of work thus allowing for faster, more efficient workflow.”

As a result of her “power user” approach to law and technology, Neff is able to easily and effectively work at home when not needed at the office. She credits technology with allowing her to increase staff productivity without increasing labour costs. In particular, she was able to retain a valued former full-time staffer by allowing her to work part-time from home while raising her children. “We can essentially do more work with the same people,” Neff says. “This means that our productivity has not gone down, but our overhead has.”

“I would encourage all practitioners to harness technology as much as possible,” she concludes. “Doing so will increase both efficiency and productivity and result in better service to clients, all of which will increase the enjoyment of the practice of law.”

### Cory Furman: tech-connected

Cory Furman is a big believer in “law tech.” A partner in MacPherson Leslie & Tyerman LLP, Furman works at the firm’s Regina office. He recently joined MLT’s intellectual property law and patent/trademark prosecution practice after operating a small IP boutique.

“For the past 12 years, our practice has been running on the ProLaw software platform, although we are now finalizing a conversion to a new IP docketing platform which will better meet our needs,” Furman says. “It has been a painstaking, time-consuming process to customize it to conform to how we

do things, but the result will justify the effort — our practice group will be far more efficient.”

Backup and system redundancy and availability is key. “On our old platform, we’d end up with our staff sitting around twiddling their thumbs during server maintenance or downtime,” he says.

Furman is a long-time user of Dragon NaturallySpeaking, a software recognition program that allows him to create letters and briefs by talking into a headset, rather than typing them by hand. “I’ve been using Dragon for the past six to eight years on a daily basis, Furman says. “The more you use the system, the better it becomes at translating your speech into the right words. That’s why I can believe Dragon’s claim of 97 per cent accuracy.”

However, this level of performance does come with a downside: With the system making very few transcription errors, those that do occur are buried within pages of legal text. “It’s thus becoming harder to proofread these documents, precisely because Dragon is so good,” he sighs.

On the road, Furman relies on a high-powered Dell XPS notebook and a Blackberry Tour smartphone loaded with VR+, a voice recorder program. “The Dell — to put it bluntly — hauls ass,” Furman says. “It runs Windows 7 64-bit edition and has 8 gigs of RAM. I got this much power to ensure that it could handle Dragon NaturallySpeaking at a decent clip. Using VR+, I simply dictate my messages to my administrative assistant on the Blackberry and it transfers them directly to their e-mail inbox for transcription or handling.”

So what kind of state-of-the-art Bluetooth-enabled headset does this tech-savvy lawyer use to talk to his computer? None: Furman opts for an economical Logitech wired headset instead. “I used to use wireless headsets,” he explains. “The problem is, they are so portable that I constantly left them behind when out of the office. At \$80 - \$90 a headset, the cost piles up fast. So now I use a wired headset that reminds me that I’m wearing it whenever I turn my head. Because it is plugged into my laptop, I don’t forget it when I’m packing up.”

Furman’s fondest wish is to get a new iPad and see how well it handles legal work, perhaps using Citrix enterprise software. “Frankly, I’m not convinced that the iPad is a better choice than the Dell laptop for what I do,” he admits. “But it just looks so cool and cutting-edge! Perhaps the iPad is a toy, professionally speaking. But hey, isn’t everyone entitled to a toy every now and then?”

### Christopher Pike: road warrior

Christopher Pike is a barrister and solicitor with Benson Myles PLC in St. John’s, Nfld. As a specialist in motor vehicle insurance claims, Pike spends a lot of his time away from his desk. This is why he takes his trusty Blackberry 8830 (World Phone) and year-old Macbook Pro wherever he goes.

“My goal is to travel as lightly as I can,” Pike says. “This is why I carry the technology that I do. For instance, the Blackberry has an application called “BlackTrack” by Aczen Innovations of St. John’s that gives me a daily record of my calls and e-mails. I can use this data to help capture and bill the time I spend away from my desk, via our firm’s Acumin office management software. Acumin is a powerful yet little-known platform made by Dexco in Montreal.”

For paperwork, he counts on Microsoft Word, which runs on the firm’s PCs and his Macbook. “I’m running the plain-vanilla version of the Windows Remote Desktop Client for Macs on my MacBook,” he says. “I use it to connect to my

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desktop via VPN from whatever Internet connection I can find. Thanks to my technology, I can do everything I need to do while away from the office, and have the security of leaving all my data on our servers. With this arrangement, my client information is never stored on my MacBook.”

Worth noting: Pike actually values Microsoft’s Excel spreadsheet program more than Word. “Considering the stereotype of lawyers as wordsmiths, this may seem counter-intuitive, but I’ve long thought that the investment I made in learning Excel has paid bigger dividends than the time I’ve spent learning Word,” he explains. “I use Excel extensively to calculate damages and model outcomes in settlement negotiations. I also use Excel during mediation to show my clients the bottom line on settlement as the numbers are discussed.”

The payoff: “In one instance, when I was representing a plaintiff in a settlement conference before the Supreme Court, I was able to show my client the net she would receive after fees and subrogated claims were deducted,” Pike says. “That net number was the number that mattered to her; not the gross settlement numbers the defence lawyer and I were passing back and forth. The judge commented to me after we reached settlement that he thought it had been very helpful for my client to immediately see how much she would receive when an offer was made.”

Pike employs Dragon NaturallySpeaking voice recognition software to speak his letters and briefs into his computer, rather than typing them by hand. So as stereotypes go, he is far from the stereotypical legal wordsmith.

For e-mail, he uses Microsoft Outlook, plus two Outlook tools called SpeedFiler and NEO for Outlook. “SpeedFiler is

an Outlook add-in that files the message to which you’re responding and your outbound message in a designated folder,” he says. “The program is pretty good at predicting the folder you want from the subject line and/or correspondent. I really like this for keeping messages filed in the folder structure I maintain for e-mail; principally a folder for each insurer I represent and a sub-folder for each matter.”

NEO for Outlook is a search engine for Outlook “that’s miles ahead of Outlook’s own capabilities,” says Pike. “This software lets you search the whole text of all stored messages and then filter by criteria like date or correspondent, so if I can drill down to the message I’m looking for quickly and easily.”

On the money-saving side, Pike has an Apple version of Benson Myles’ Voice over IP (VOIP) telephone software waiting to be installed on his Macbook. This will allow him to make telephone calls over the Web, thus saving money on cellular air time charges, like his colleagues at Benson Myles do now with their Windows-based notebooks. “In the meantime, our VOIP system is configured to send my Blackberry an audio file anytime a voice message comes in,” he says. “I can check the voice message and make the return call.”

For the future, Pike hopes to use either an iPad or Plastic Logic Que to make going through electronic documents easier and more pleasant. “I have been using Sony’s Personal Reader electronic book device for the past three years and I love it,” he says.

“This technology is a natural for the legal profession, if you marry the capability to load your own Word and PDF files to the larger screens that the iPad and Que offer.” ■

James Careless is a freelance writer based in Ottawa.

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