PRACTICE MANAGEMENT: TECHNOLOGY, SOCIAL MEDIA, CONTROLLING COSTS, AND KEEPING YOUR SANITY IN A DIFFICULT IMMIGRATION ENVIRONMENT

PRESENTED BY
DAN PINNINGTON, LAWPRO
REID F. TRAUTZ, AILA PRACTICE & PROFESSIONALISM CENTER

2018 | Northern Border U.S./Canada Immigration Conference

Productivity Matters

□

productivity

noun | pro·duc·tiv·i·ty | \ˌprō-dək-ˈti-və-tē, ˌprä-, prə-ˌdək-\

noun
1. the quality, state, or fact of being able to generate, create, enhance, or bring forth goods and services:
The productivity of the group's effort surprised everyone.

2. *Economics.* the rate at which goods and services having exchange value are brought forth or produced :
Productivity increased dramatically last year.

Productivity Matters

☐ Time/Distraction Management

☐ Office Productivity

☐ Productivity Enhancers

☐ Email Productivity

Time/Distraction Matters

☐ Eliminate computer distractions:

- ❏ Pop-ups
- ❏ Smartphone Notifications
- ❏ Social media feeds
- ❏ SPAM and BACN
- ❏ Monitor placement

This is a pop-up distraction!

Time/Distraction Matters

- ☐ Losing focus and concentration
  - ◻ Digital world reducing concentration
  - ◻ Harder to get long-term tasks completed
  - ◻ Try the Pomodoro technique
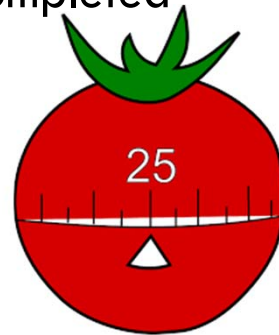
Productivity Matters

- ☐ Helpful Apps
  - ◻ PomoToDo: Helps with PT
  - ◻ RescueTime: finds lost time
  - ◻ StayFocusd: Chrome extension
  - ◻ Freedom: Blocks the Internet

Office Productivity Matters

- □ Phone Calls
  - ◻ Return calls in scheduled blocks of time
  - ◻ Leverage voice mail
    - ■ Inbound
    - ■ Outbound

Office Productivity Matters

- □ Calendar "hard" and "soft" tasks
  - ◻ Hard = court hearings, discovery dates, client appointments, etc.
  - ◻ Soft = marketing activities, billing, process improvement, thinking time

Office Productivity Matters

- Optimize your workspace
  - De-clutter workspaces
  - Reduce desktop storage
  - Increase nearby file storage

Office Productivity Matters

- Optimize computing space
  - Dual monitors
  - Adjust settings

Office Productivity Matters

- ☐ Optimize file storage
  - ☐ Paper
    - ■ Color code
    - ■ Consistent organization
  - ☐ Digital
    - ■ Consistent organization
    - ■ Similar to paper

Productivity Matters

- ☐ Increase productivity by reducing risk
  - ☐ Evaluate the costs and benefits of each new client
  - ☐ Learn to say "no"
- ☐ Increase efficiency (doing things right)
- ☐ Delegate. Repeat.
- ☐ Document unbillable time

Productivity Matters

☐ Embrace practice management software

Goodnight, PDF

☐ Have Adobe Acrobat read your document to you

☐ View>ReadOutLoud>Activate

Affordable Video Conferencing

Zoom Video
www.zoom.us

- Up to 25 Participants
- Unlimited meetings
- Recordings
- Screen-sharing
- iPad / iPhone apps
- $9.99/month

Give Your Office a Stress-Reducing Makeover

□ Poor lighting = eyestrain

□ Excess noise = Distraction/Frustration

□ Poorly positioned computer = trouble

□ Add a water cooler for better health

vs.

Office Productivity Matters

- Mobile Business Apps
  - IFTTT
  - Zapier

IFTTT.com

Zapier

Gmail · Trello · Google Calendar · Slack · MailChimp · Typeform · Twitter

Copy file to Dropbox or create a text file for each new Google Document

⚡ Popular Zap — Use this Zap

Create Google Doc file from Solid meeting's notes

⚡ Popular Zap — Use this Zap

Save Typeform form entries to Google Docs

Use this Zap

Save New Evernote Notes to Google D

Use this Zap

Office Productivity Matters

☐ Online credit card acceptance

  ▫ Let the client do the work

  ▫ Secure payments

Office Productivity Matters

- Remote access technology
- Work on your office computer from anywhere
- Affordable and secure

LogMe In

MY PC GoToMyPC

join me

Microsoft Remote Desktop

Productivity Enhancers

- Get regular exercise
- Practice good nutrition
- Impose a quitting time
- Take a real break at lunch
- Have an office make-over

Being healthy & happy

Email Productivity

- The McKinsey Global Institute: Average U.S. worker spends 13 hours a week reading and responding to email.

- According to SaneBox, the average inbox contains only 38% important, relevant emails.

- Danwood Group study: Takes an average of 64 seconds to recover/refocus from an email interruption, regardless of the email's importance.

Email is not your job!

- Have a strategy
- It's not about the technology, but about human behavior
- All email is not created equal
- Choose the tactics and tools that work for you

The Different Types of Email

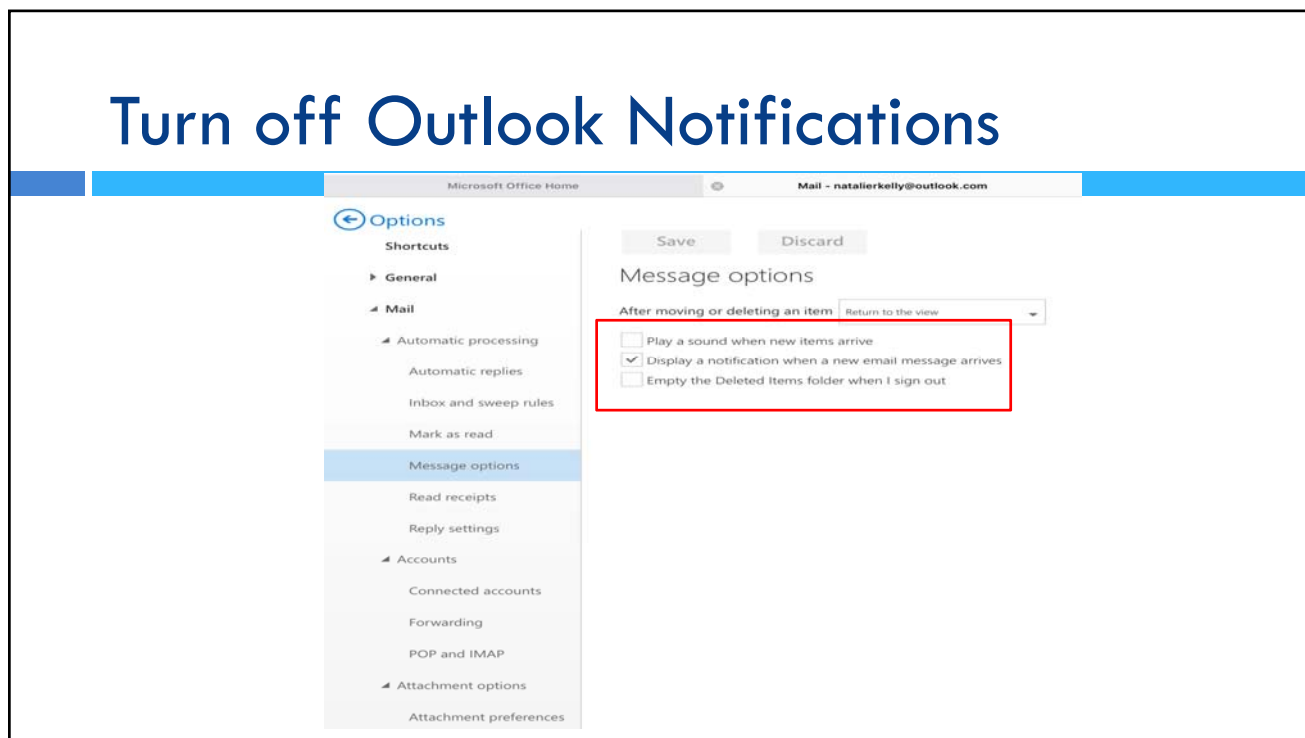| Urgent and important	Important but not urgent
1	2
3	4
Urgent but not important	Not urgent and not important

Source: Dwight D. Eisenhower/Stephen R. Covey

Email Productivity

☐ Prevent unimportant emails from getting to your Inbox

- ❑ Deal with SPAM
- ❑ Unsubscribe from BACN
- ❑ Divert to subfolders using Rules

Turn off Outlook Notifications

Email Productivity

☐ Schedule several blocks of time each day to review your email

- ▣ Don't have your Inbox on screen all day

- ▣ During each session have a disciplined approach to review and react to each email

Triage Tactics

- ☐ Scan and delete unwanted emails
- ☐ Read, then file or delete if no reply needed
- ☐ Delegate/Forward to others to respond
- ☐ Do the ones that will take 2 minutes or less
- ☐ Defer the ones that need more attention
  - ◻ Move to an Action folder; or
  - ◻ Create a reminder or task

Email Productivity

- ☐ Reorder how you create an email to be more productive:
  - ◻ Add the attachments first
  - ◻ Create the body of the message
  - ◻ Add a succinct subject line
  - ◻ Add recipients

Email Productivity
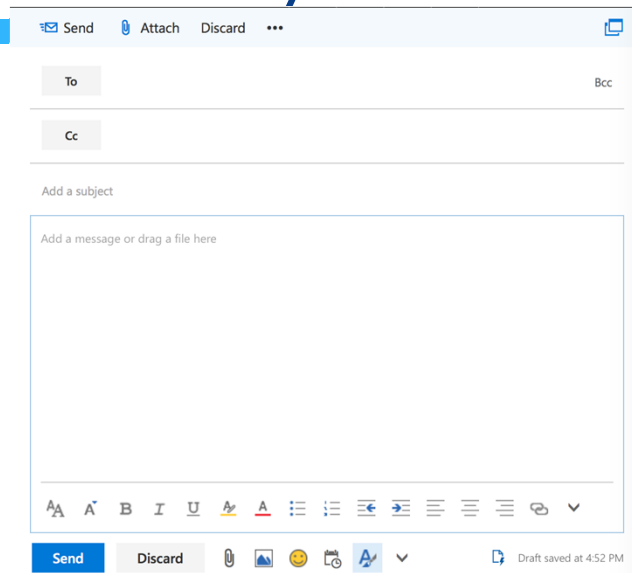
Email Tools

Outlook Rules

☐ Allows you to auto-sort your incoming email (among other things)

☐ 2010: File menu > Info > Rules and Alerts

☐ 365: Settings>Options>Mail>Inbox and sweep rules

☐ Gmail: Settings>Filters>Create a filter

Inbox Cleanup Tools

☐ Mailstrom

☐ The Email Game

☐ Unroll.me

☐ Sanebox

Sanebox

SaneBox automates email chores

We prioritize your Inbox and let you know if an email didn't receive a reply.

We can also sort your Inbox, keep track of reminders and snoozed emails, rescue real email from your spam folder, upload attachments to your cloud, and more...

SaneLater
We think these emails can wait.

SaneBlackHole
Easily train mailing lists and individual senders to your trash folder.

SaneSnooze
Defer an email until tomorrow, next week, next month, or any time.

SaneReminders
Set email reminders for your future self.

SaneAttachments
Say goodbye to bulky attachments and hello to automatic uploads to the cloud.

SaneNoReplies
Quickly see all deadbeats that didn't reply to your emails.

SaneNews
All of your mailing lists and newsletters in one place.

Custom training
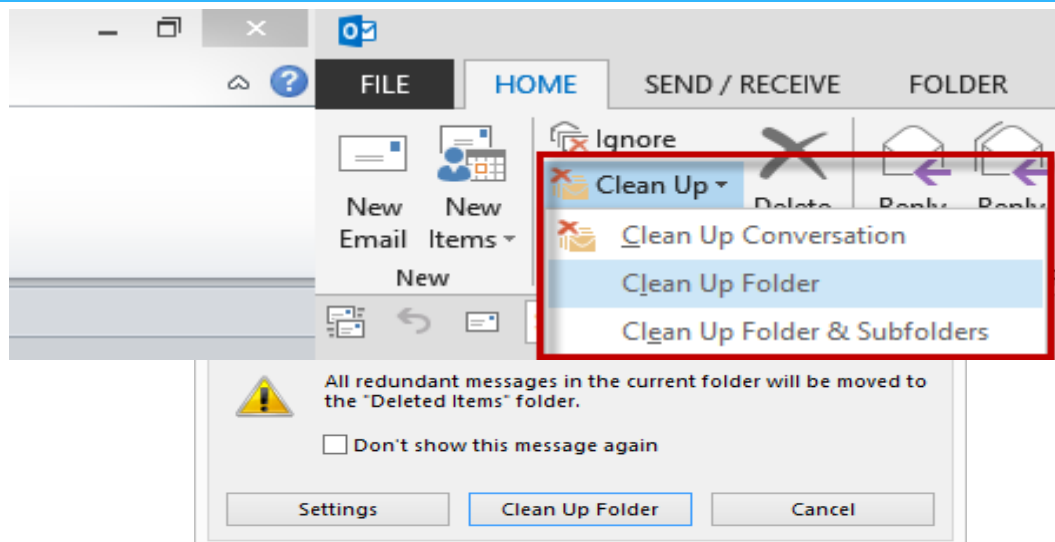Create your own custom SaneBox folders.

SaneNotSpam
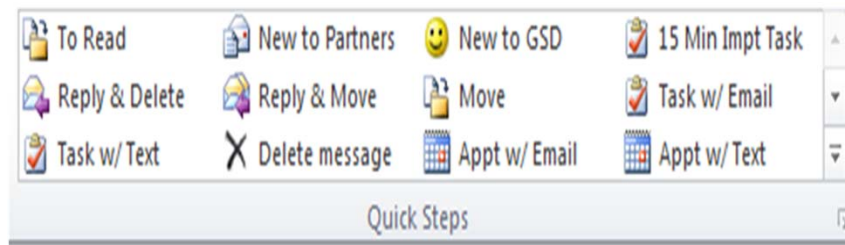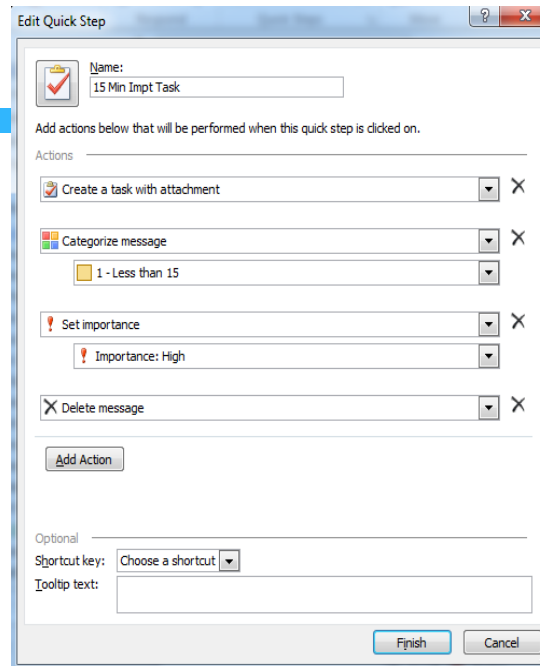Rescue real email from your Spam folder.

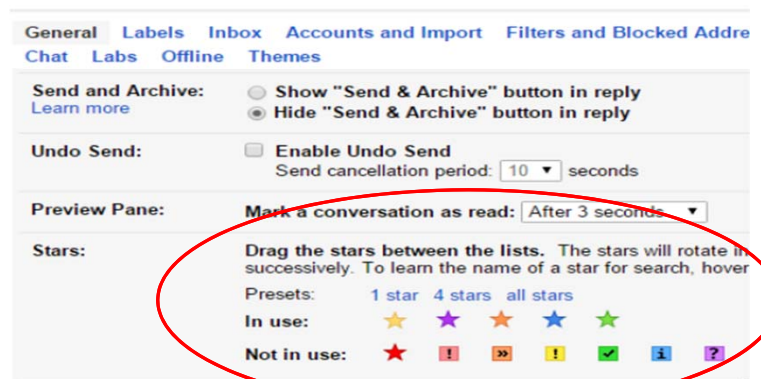# Clean Up Conversations
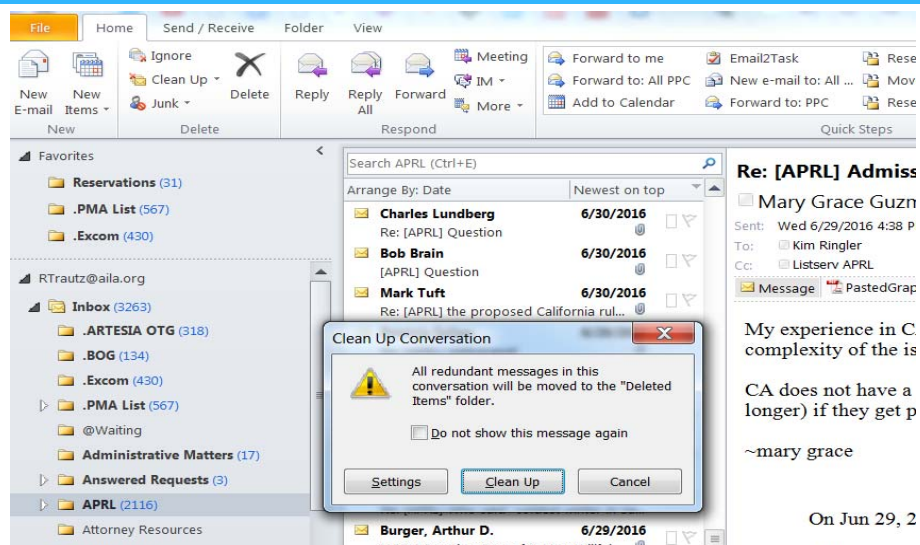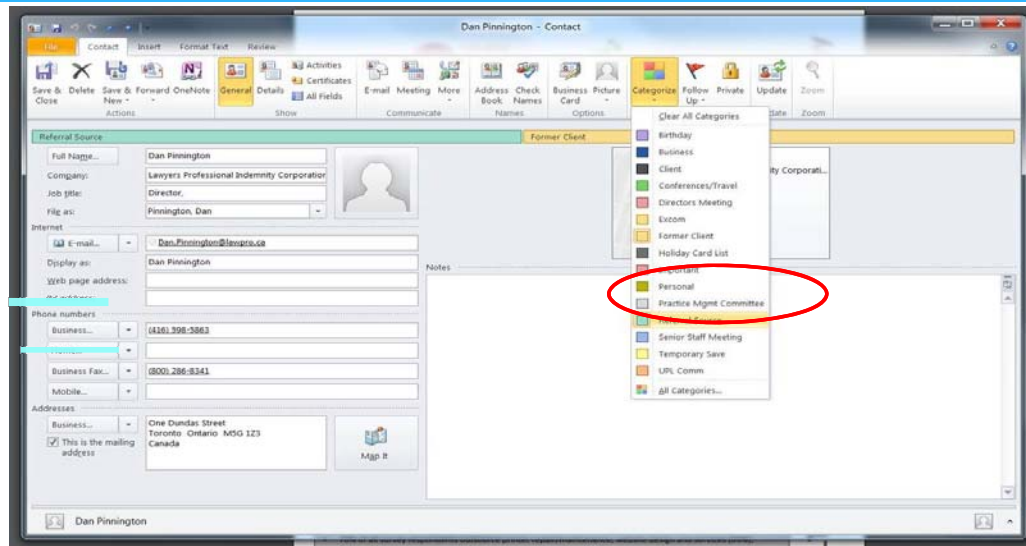
Office 365

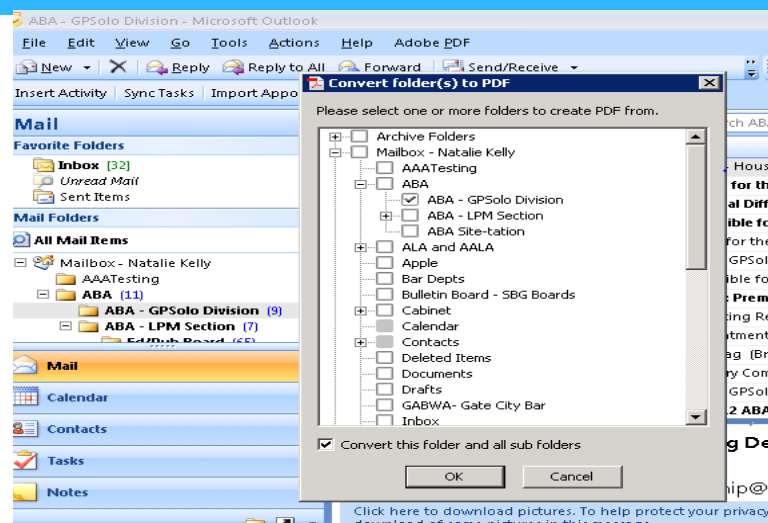# QuickSteps

QuickSteps

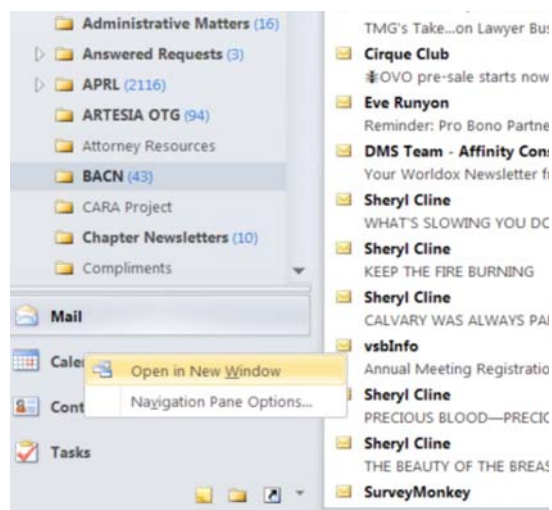# Outlook Flags & Gmail Stars

Outlook Categories

Convert Outlook Email and Folders to PDF

One Not Enough?

- Open as many Outlook 'Modules' as you want
- Right Click, Choose Open in New Window

Turn Your Phone Into a Scanner

Scanner Pro (iOS) - $6.99

Genius Scan (Android) - $6.99
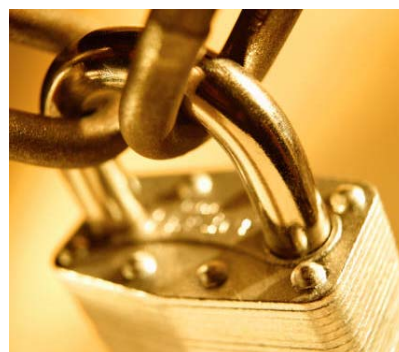
Security Matters

Security Matters

☐ Training partners & employees

☐ Backup and disaster recovery

☐ Securing laptops, smartphones and mobile devices

☐ Authentication and access control

☐ Encryption of stored and transmitted data

☐ Wireless network security

☐ Security considerations in hiring & firing employees

Evolving Security Precautions

- Staying ahead of the criminals
- Security standards change
- Rule 1.1-Competence

Top Two Threats to Your Practice

- **Phishing/Spear Phishing**
  - Access to sensitive info disguising as trusted entity or person
  - Requires training people to recognize
  - Hardening resistance

- **Ransomware**
  - Paralyzing virus locks all files
  - Extorts money in exchange for files

Training Partners & Employees

- Continuing Education
- Usage Policies
- Anti-virus/Security Updates
- Confidentiality Agreements
- Testing/Tempting

Backup & Disaster Recovery

- Automatic back-up software
- Large & reliable local storage device
- Off-site storage service
- Competent person to ensure it works

Ransomware

who likely will continue to target an organization. While the FBI does not advocate paying a ransom, there is an understanding that when businesses are faced with an inability to function, executives will evaluate all options to protect their shareholders, employees, and customers.
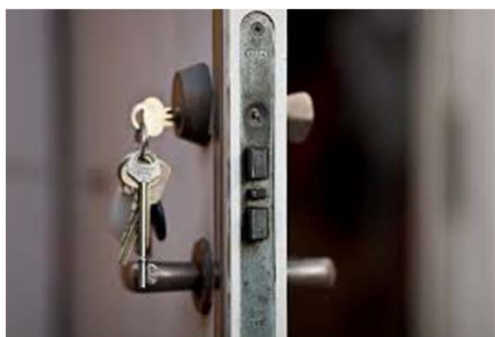
Top Two Threats to Your Practice

☐ When infected with Ransomware:

- ◻ Consult your IT professional
- ◻ Check your latest back-up
- ◻ Check whether all files encrypted
- ◻ Check NoMoreRansom.org
- ◻ Consult Bitcoin buying guide
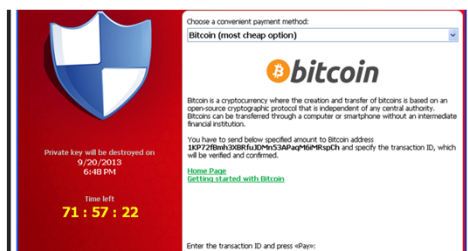
Securing Mobile Devices

- Each laptop, tablet, and smartphone is an unlocked door into your office
- Security matters!

Securing Mobile Devices

- Password Protection
  - Must be engaged
  - 8-12 character phrases
- Two-factor Authentication
  - Device registration
  - Biometrics

Encryption

- Stored data
- In-transit data
- Garbles words/unreadable

Securing Internet Accounts

- Strong passwords on all online accounts
- Don't duplicate
- Use Password Managers

Cloud Security Precautions

- Read Terms of Service
- Know your rights
  - Data breach
  - Data ownership
  - Data recovery
- Strong passwords

Secure Remote Access-VPN

- Access your office computer from anywhere (with Internet)

Wireless Network Connectivity

TunnelBear

Hotspot Shield

vyprvpn

- Unsecured Wi-Fi networks are unsecure
- No password, no connection!
- Use VPN to connect

Personnel Matters

- Integrating security into the on-boarding process
- Integrating security into the exiting process
- Vendors/Contractors

Evolving Security Precautions

□ USB thumb drives

□ Metadata

□ Social media

QUESTIONS?

PRESENTED BY DAN PINNINGTON & REID TRAUTZ