

Technology Corner

By Joseph G. Hodges, Jr.

ABA TechShow 2007—One Observer's Comments

A few times in the past I have done a review article about the TechShow that the American Bar Association holds every spring, usually in Chicago. Often the timing of the spring due date for this column comes before TechShow takes place, so we have been unable to do reviews of it in those years. Fortunately, TechShow came early this year, on March 22–24, 2007, so this article will review the ABA TechShow and discuss resources viewed at that event. This year the show was held at the Sheraton Chicago Hotel & Towers all day Thursday and Friday and half-day on Saturday, which allowed plenty of opportunity for people to travel to Chicago on Wednesday in time for the show and to return home on Saturday or Sunday ahead of the next work week. Friday, May 23rd was Solo/Small Firm Day, which was a new event this year.

This year there were 50 educational sessions that were spread out over 16 different tracks on two and one-half days. They covered diverse topics such as (1) Acrobat/PDF and the Paperless Office; (2) Advanced IT; (3) Basic IT; (4) Good, Better, Best; (5) Communicate, Collaborate and Connect; (6) E-Discovery (a really hot topic this year); (7) E-Ethics; (8) Going Mobile; (9) Law Practice Management Tips; (10) Litigation; (11) MS Office; (12) Records Management; (13) Show Me How; (14) Interest Group Roundtables; (15) Solo/Small Firm Tracks; and (16) Vendor Tracks. In addition, more than 100 vendors held forth in the Exhibition Hall all day Thursday and Friday and received a great deal of traffic, as four exhibit hall breaks were made a part of the program schedule on each of those two days.

Each registrant received a 256 MB USB thumb drive (suitable for saving all your notes from the show), a \$20 Book Buck that could be redeemed on site at the Law Practice Management Bookstore, and a CD ROM containing all the speaker presentation



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materials and more, plus a box lunch on Thursday and Friday. This CD ROM can also be purchased by those who could not attend the show by going to the show's Web site at www.techshow.com. Participants were also eligible for great prizes if they filled out their Passport and visited enough vendors. If they wanted to communicate with their offices, they could use the Cyber Café in the Exhibit Hall. Better yet, if they had their own PC in tow, they could use the free WiFi Internet Access "cloud" that covered the entire Ballroom level where all the CLE classes were being presented. The show also arranged for a variety of dinners out on the town called the Taste of TechShow. These were focused on various technology topics so those participants with a common interest could enjoy an evening out together with dinner (a massive undertaking but one that was quite popular this year). Lastly, the Conference provided a Conference Concierge service that was available for assistance with any items concerning the Conference, including selecting what CLE sessions to attend.

Obviously, it is quite impossible for someone to attend all 50 CLE sessions, especially since they are run on six different tracks that run at the same time. Sometimes you can hit two sessions during one track, but that is more a function of one's interest level in what those two tracks are all about. I will have to limit my remarks to the CLE sessions I attended. I started off my first day with the Adobe Acrobat 8.0 roundtable, as I was anxious to find out more about this new release and its minimum requirements. One of the speakers was none other than Rick Borstein of Adobe Systems, so this session was well worth the price of admission. They even gave us an Adobe t-shirt just for attending. My next session on day one was all about The Lawyer's Guide to Marketing on the Internet. The presenters of this session were Greg Siskind and Rick Kalu, the authors of the newly released third edition of the ABA book about the same subject. If you have ever thought of marketing on the Internet, this is a must-read book.

The afternoon sessions on the first day started off with the Keynote Address by Hon. Shira A. Scheindlin of the United States District Court for the Southern District of New York. The thrust of her presentation was all about emerging e-discovery and the cases and rulings she has been involved with in this regard—all in all, a frightening topic, but one that is here to stay. Following up on my morning sessions, I decided to attend "60 Marketing Tips in 60 Minutes" after the Keynote address, especially since Jim Calloway and

the Show Chair Dan Pinnington were two of the four presenters. Jim, as the LPM guy for the Oklahoma Bar, takes a really practical and down-to-earth approach to a subject like this, especially when it comes to all the potential ethics traps. Since I was already on a 60-minutes kick (a popular topic at TechShow), I decided to attend "60 Technology Tips in 60 Minutes" for my last session of the day. The panel discussed software, hardware, gadgets, utilities and the Web as well as the ethical issues that are raised by the use of technology, all with a view toward providing better client service and getting things done better, faster and cheaper. The day ended with a nice cocktail reception in the Exhibit Hall where we could mingle informally with all the vendors. Every registrant was given tickets for two free drinks—a pretty good deal if you ask me.

First up on day two, I decided to concentrate on the Solo and Small Firm track since I am a solo practitioner. The first session was "Talking to Yourself: Your Voice is Your Legal Assistant," taught by Jim and Laura Calloway. This session dealt with voice recognition software, the message being that this sort of software has arrived. My second session on day two was "Paperless Office: Slaying the Paperless Dragon." While I have heard this presentation before, usually by Colorado's own David Masters (author of the ABA book on Adobe), this time the speakers were new. The presenters convinced me that the dream of a paperless office is now a reality if one is willing and able to head in that direction.

The first afternoon session I attended on the second day was another Solo/Small Firm program entitled "Hardware and Software: You Bought It, You've Got It ... Now Use It." The presenters taught us how to take a software and hardware inventory, and tips and tricks to determine if we may already have the tools we need. I finished off the day with yet another Solo/Small Firm program, this one entitled "Capturing More Time [and Billing It Too]." They gave us practical tips, tricks and techniques that allow us to better manage, capture, enter, charge and collect our time. They also showed us how we can make our earnings grow without working longer or harder (now that is a solution I like a lot).

On the third day (Saturday), since it was only a half-day, I decided to finish things off with dual back-to-back sessions in Adobe Acrobat, first for new users and second for power users. Both of these sessions were taught by David Masters of Colorado

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and Catherine Sanders Reach of the ABA's Law Information Technology Department. Katherine was pretty able to keep David under control, as his knowledge in this area is quite good and in-depth. In the basic session, they taught us how to work with the PDF forms that we willingly or otherwise download every day, that the free Reader software is just not sufficient for what we need, how to create and manipulate PDF documents, archive e-mails, create PDFs from Web sites, and combine different files to create an e-brief. In the advanced session, they taught us to redact documents, use the Bates numbering feature, create electronic forms, secure documents, remove metadata, and how to use bookmarks and sticky notes. The final wrap-up session on Saturday was the ever-popular "60 Sites in 60 Minutes," which has become a must-have part of TechShow ever since it was first introduced a few years ago. This year, three ladies did the presenting, and what a job they did. This is a fast-paced presentation, so it is virtually impossible to write down the URLs of all the places they visit as the presentation goes on. Fortunately (for us) a listing of all the sites and what they are is posted on the TechShow Web site (www.techshow.com) soon after the show concludes. The sites for this 2007 presentation are already up, as are all the links from past shows starting with the year 2001. Some of these sites are most serious and relate directly to the practice of law, but many of them are there for the uncontrolled laughter they brought forth from

those of us who were in the audience. This is an absolute must-see part of the show.

As for the Exhibitors this year, while there were more than 100 in total, the offerings that relate to the trusts and estates and allied fields of practice were few and far between, perhaps because this show is no longer viewed by most vendors as one that is beneficial to their marketing efforts. Instead, many of them have moved to places like the Miami Heckerling Institute that is held in Florida each January. Of particular note amongst the missing were Wealth Transfer Planning, Drafting Wills and Trust Agreements, Pro-Doc, CCH's View Plan and GEMS, just to name a few. The vendors of interest who were there included, in no particular order, (1) Adobe Systems Incorporated, www.adobe.com/legal/; (2) Amicus Attorney and Small Firm, www.amicusattorney.com/; (3) CompuLaw, www.compulaw.com/; (4) Consultwebs.com Inc., marketing—www.consultwebs.com/; (5) Corel Corporation, www.corel.com/; (6) Dell, Inc., www.dell.com/; (7) Thomson FastTax, www.fasttax.thomson.com/; (8) Hewlett Packard, www.hp.com/; (9) Juris, Inc., www.juris.com/; (10) LexisNexis and Court Link, www.lexisnexis.com/; (11) NextClient.com, marketing—www.nextclient.com/; (12) PerfectLaw Software, www.perfectlaw.com/; (13) Tabs 3 Billing software, www.tabs3.com/; and (14) WealthCounsel LLC, www.wealthcounsel.com/. I urge you to visit the Web sites of the vendors you are interested in, as the information there will be much more comprehensive than we can provide for you here.

The dates for next year's TechShow are already set. It will be held March 13–15, 2008, at the

Hilton Chicago hotel. Note that this venue will be a new one for those of you who are accustomed to attending at the Sheraton Chicago Hotel & Towers, but I have it on authority from the Section Director for the Law Practice Management Section of the ABA that this new venue will be much improved over what the Sheraton can currently offer. So be sure to mark this event down on your 2008 calendar and attend.

Featured Web Sites

- **TaxBrain:** a much improved tax filing product when compared to TaxAct—www.taxbrain.com and www.taxact.com
- **Sample Questions to Ask Online Storage Vendors**—www.scbar.org/pmap/documents/Questionstoaskonlinestoragevendors.pdf
- **Gmail from Google:** now available to anyone; an invitation is no longer required—<http://mail.google.com/mail/help/intl/en/about.html>
- **The Crabby Office Lady:** Microsoft help with a smile—office.microsoft.com/en-us/help/FX101679371033.aspx

Life Insurance

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Trends in Universal Life

Watch for more planners seeking to avoid insurance policies where the cost is indeterminate. Historically, universal life policies were such animals. However, the latest generation of universal life policies offers a guaranteed death benefit for a guaranteed premium, thus merging two major attributes