

1. Record Nr.	UNINA9911008918303321
Autore	Fortier Christopher R
Titolo	The Lawyer's Guide to Office Automation : Tools and Strategies to Improve Your Firm and Your Life
Pubbl/distr/stampa	Cleveland, : American Bar Association, 2023 La Vergne : , : American Bar Association, , 2023 ©2023
ISBN	9781639052318 1639052313
Edizione	[1st ed.]
Descrizione fisica	1 online resource (173 pages)
Disciplina	340.068
Soggetti	Law offices - Automation Office management
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Title from eBook information screen..
Nota di contenuto	Cover -- Title Page -- Copyright -- Contents -- About the Author -- Introduction: Why Automate? -- Chapter 1: The Ethical and Data Protection Rules -- Part I. The First Steps toward Setting Up a More Efficient Business -- Chapter 2: Plan, Design, Lay It Out: Strategy and Workflow -- Chapter 3: How to Decide What to Buy -- Chapter 4: The Spreadsheet (the Master of Data) -- Chapter 5: Timekeeping, Billing, and Payment -- Part II. Using Forms to Capture Data and Feed It Securely to Other Automation Tools -- Chapter 6: Get to Know the Form -- Chapter 7: Forms: Beyond the Basics -- Chapter 8: Add-ins and Add-ons -- Part III. Leveraging Automation for Client Communication and Scheduling -- Chapter 9: Auto-Replies, Rules, and Notifications -- Chapter 10: Scheduling Automation -- Part IV. Generating Better Documents in Less Time -- Chapter 11: Document Assembly -- Chapter 12: Proofreading and Editing -- Chapter 13: The Fillable PDF and E-sign -- Part V. Making Your Automation Tools Work Together -- Chapter 14: Integrating Multiple Automation Apps Like Zapier with Other Software -- Chapter 15: The Multi-Step Zap or Automation -- Conclusion -- Index
Sommario/riassunto	This book provides a comprehensive guide to automating office tasks

within a legal practice, with a focus on enhancing efficiency and reducing mundane work. It covers strategies for planning and designing workflows, selecting appropriate tools, and using forms to securely capture data. The text emphasizes the importance of client communication, scheduling, and document generation. Additionally, it explores the integration of multiple automation applications to streamline operations. The author, Chris Fortier, draws on his experience with the Social Security Administration and his involvement in legal associations to offer practical insights. This book is aimed at legal professionals seeking to optimize their practice through technology.
