

# Microsoft Word for Legal Professionals



**Jordan Turk**

Attorney & Legal Technology Advisor, Smokeball



# Housekeeping



## Ask Questions

Ask us questions using the **Q&A** (1)

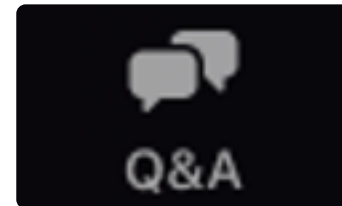
Engage with attendees with **Chat** (2)



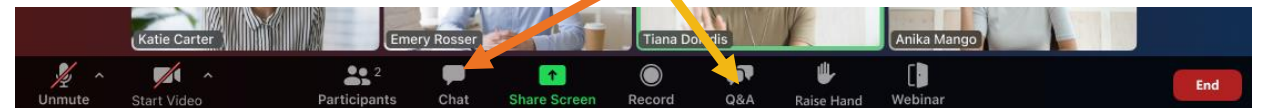
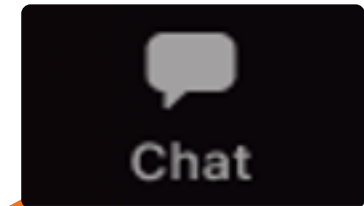
## Recording & Slides

Recording and slides will be available after the presentation.

(1)



(2)





# Jordan L. Turk

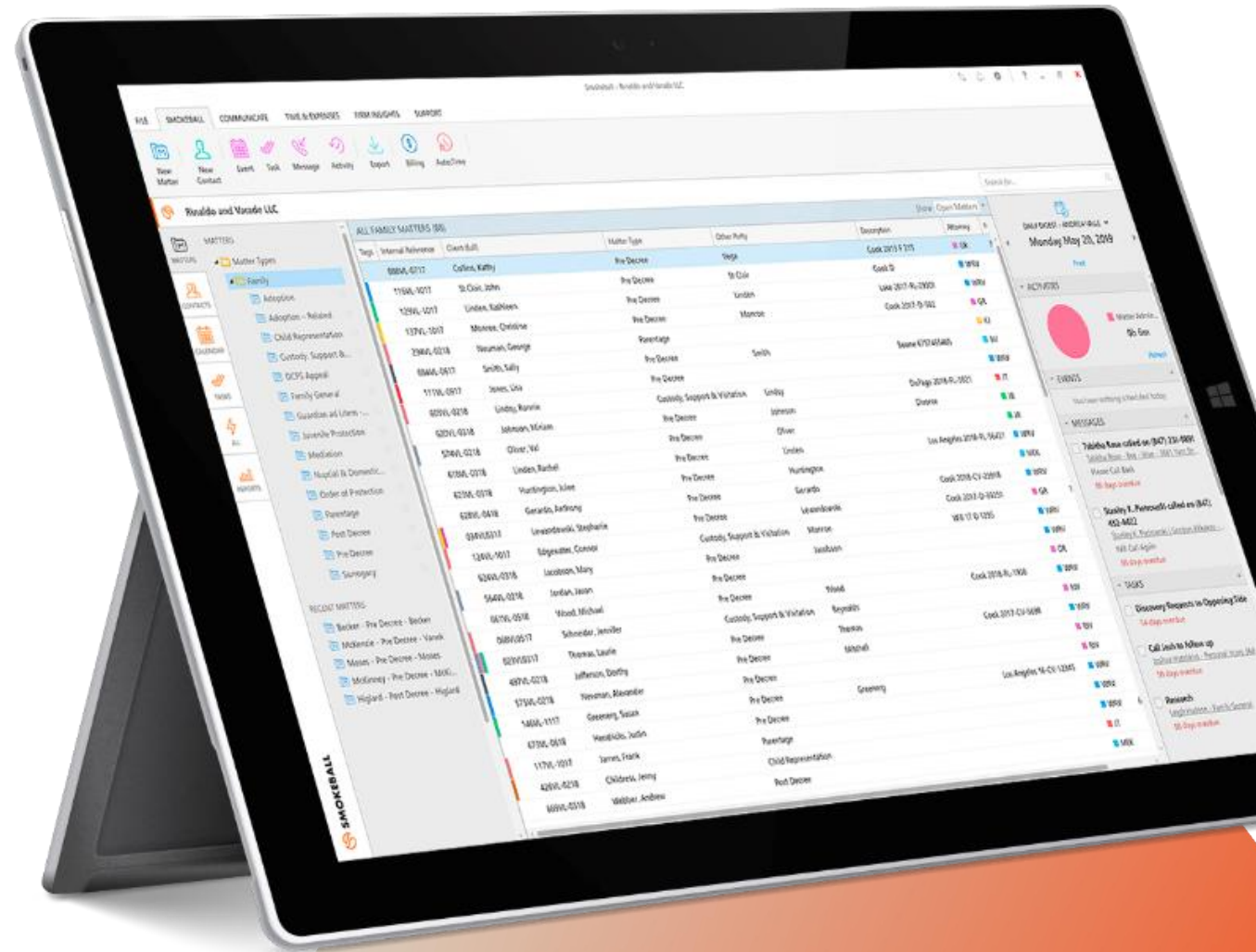
Attorney and Legal Technology Advisor, Smokeball

- JD, University of Arkansas School of Law
- BA, The University of Texas at Austin
- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success



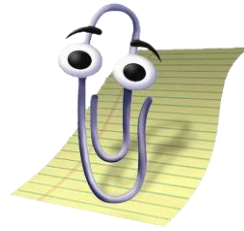
# The #1 Legal Case Management Software for Law Firms

- Automatic time tracking - bill more accurately with a fraction of the effort
- Prebuilt workflows for specific practice areas
- Seamless integrations with Microsoft Word and Microsoft Outlook
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- Identify business opportunities through powerful insights and reporting



# AGENDA

- **Part 1: Keyboard Shortcuts**
- **Part 2: Quick Access Toolbar**
- **Part 3: Automation**
- **Part 4: Clipboard**
- **Part 5: Paste Options**
- **Part 6: Final Tips**

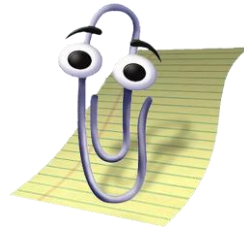


# Keyboard Shortcuts

# Keyboard Shortcuts

- Cut (CTRL + X), Copy (CTRL + C), and Paste (CTRL + V)
- CTRL + Z (undo)
- CTRL + N (new document)
- CTRL + Home/End
- CTRL + Click (highlights entire sentence)
- CTRL + Triple Click (highlights entire paragraph)
- CTRL + A (highlights everything)

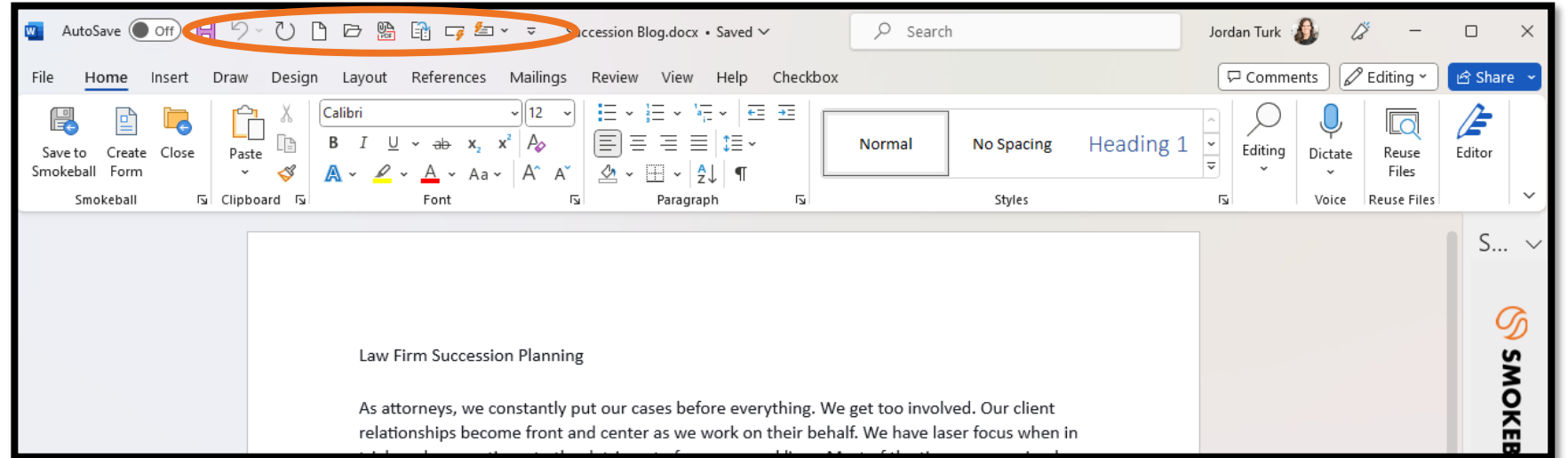
**Get comfortable with these! The less you need to use your mouse, the better.**



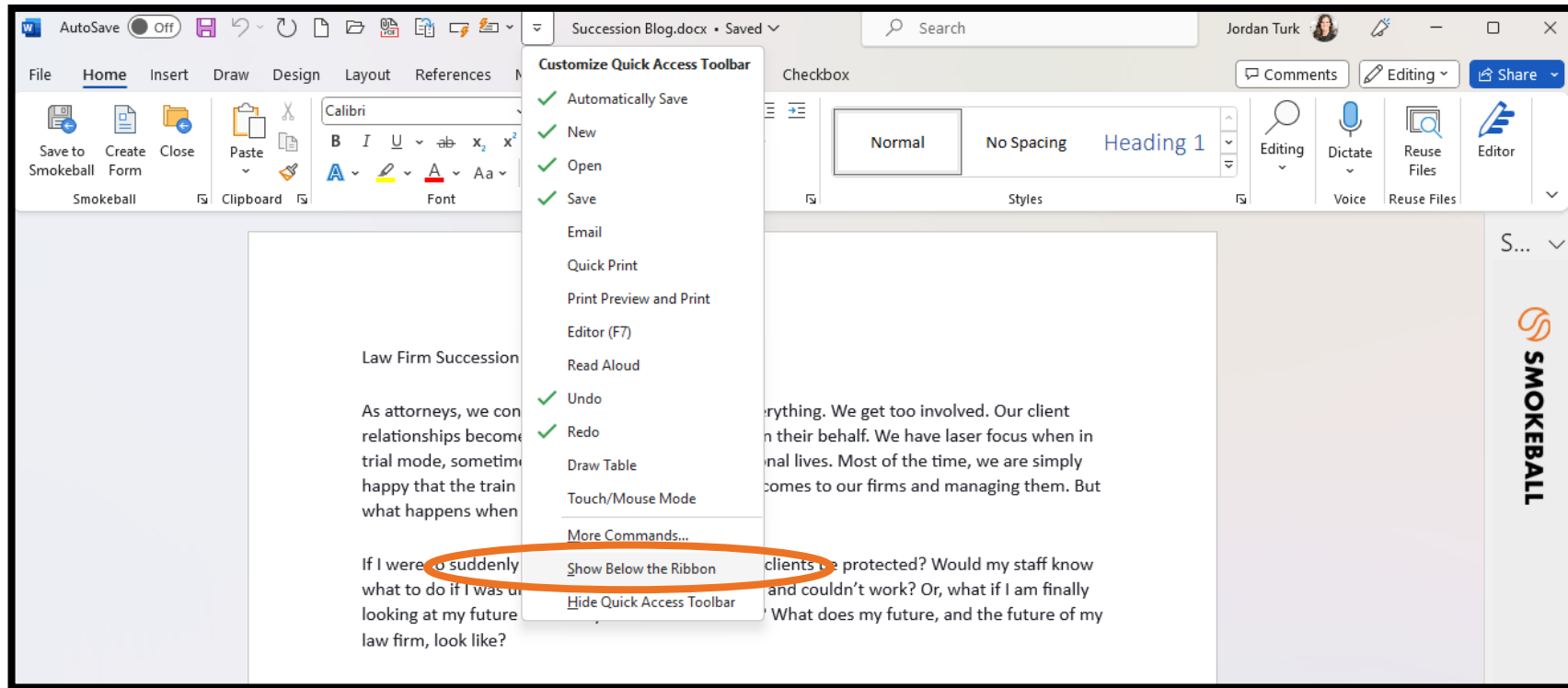
# Quick Access Toolbar



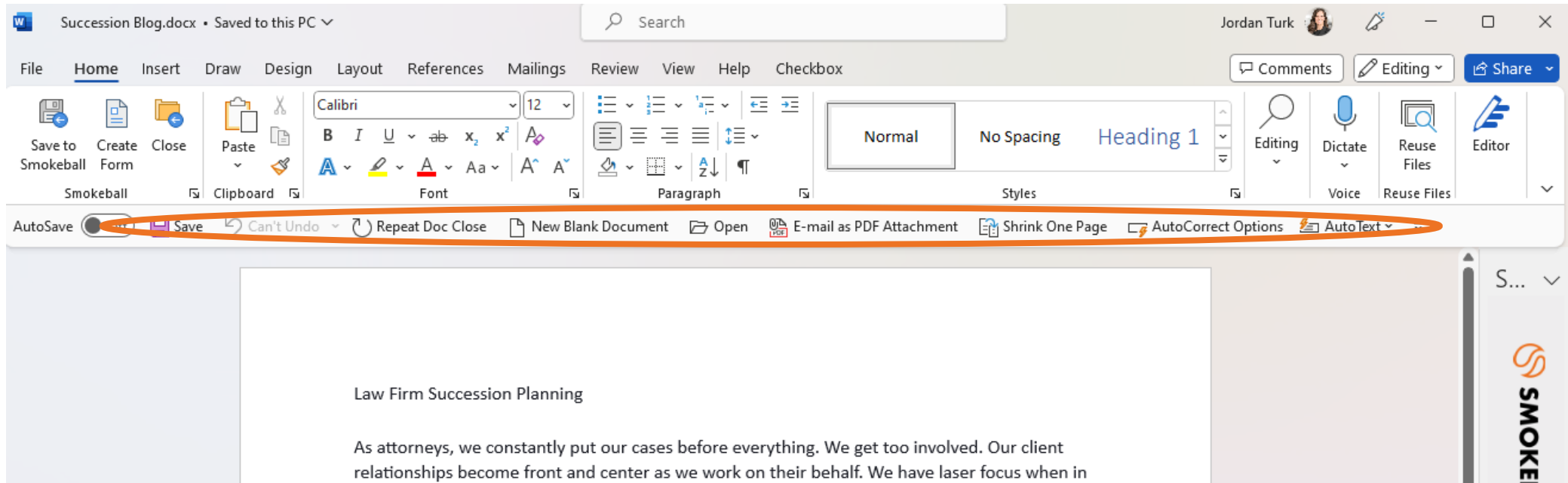
# Where is this thing?

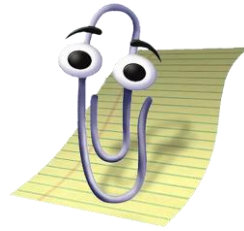


# You can change its positioning to make things more convenient:



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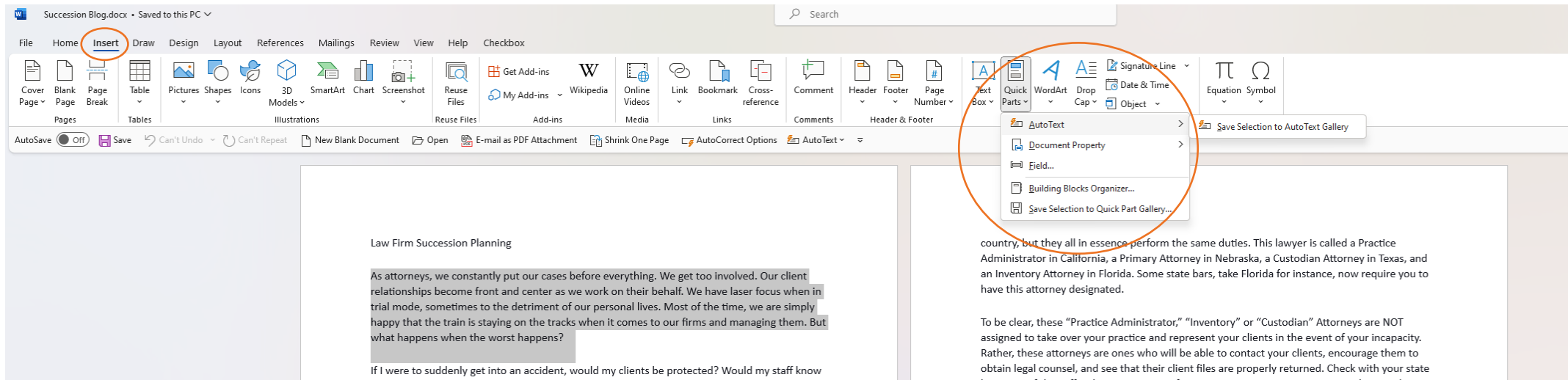




# Automation

# Word Automation – Dipping Your Toe in the Automation Waters

- Saving templates/popular provisions for future use (Quick Parts)
- Additional uses: signature blocks, case styles, clauses you constantly use
- Can also add this to your Autotext!
- Caution: Quick Parts does not remember the formatting of the document that it originally came from; it will adapt to the document that you paste it into



# Find & Replace Are Your Friends (but be careful)

## Law Firm Succession Planning

As attorneys, we constantly put our cases before everything. We get too involved. Our client relationships become front and center as we work on their behalf. We have laser focus when in trial mode, sometimes to the detriment of our personal lives. Most of the time, we are simply happy that the train is staying on the tracks when it comes to our firms and managing them. But what happens when the worst happens?

If I were to suddenly get into an accident, would my clients be protected? Would my staff know what to do if I was unexpectedly waylaid for months and couldn't work? Or, what if I am finally looking at my future with an eye toward retirement? What does my future, and the future of my law firm, look like?

Legal professionals need to plan for the worst in order to ensure the best outcome for ourselves and our practices. Whether it's a planned transition out of law or an unexpected surprise cessation of practice (we are not immune from catastrophic health events), it is incumbent upon us to have a succession plan in place. Below we will go through the steps of making a law firm succession plan, including what duties you owe to your clients.

### Ethical Considerations

ABA Model Rule 1.6 reminds us that we owe a duty of confidentiality to our clients. So, what happens when an attorney suddenly passes away and doesn't have the proper staff available to notify his or her clients? Who can access the attorney's trust account so that they can remit the proper amounts to clients who now have to rush and find new counsel?

country, but they all in essence perform the same duties. This lawyer is called a Practice Administrator in California, a Primary Attorney in Nebraska, a Custodian Attorney in Texas, and an Inventory Attorney in Florida. Some state bars, take Florida for instance, now require you to have this attorney designated.

To be clear, these "Practice Administrator," "Inventory" or "Custodian" Attorneys are NOT assigned to take over your practice and represent your clients in the event of your incapacity. Rather, these attorneys are ones who will be able to contact your clients, encourage them to obtain legal counsel, and see that their client files are properly returned. Check with your state bar to see if they offer this as an option. If not, I encourage you to petition your bar to adopt a Custodian Attorney policy.

The image shows a 'Find and Replace' dialog box from a software application. The dialog has a title bar with a question mark and a close button. Below the title bar are three buttons: 'Find', 'Replace', and 'Go To'. The 'Find what:' field contains the text 'attorneys' and has a dropdown arrow. The 'Replace with:' field contains the text 'lawyers' and also has a dropdown arrow. At the bottom of the dialog, there are five buttons: 'More >>', 'Replace', 'Replace All', 'Find Next', and 'Cancel'. The 'Find Next' button is highlighted with a blue border.

The onus usually falls upon your state bar to handle incapacity or and/or occupies valuable bar resources that are better spent on these cases start monopolizing the bar employees' workday, you are all due. Sometimes, a court has to step in and appoint a guardian of your client files. Whether by state bar or by court, this is a task that might be detrimental to your clients' cases. This is why having a designated attorney to handle these matters is key.

If your intention is to eventually sell your practice, or if you simply want to make it easier for someone to come in and perform client triage in the event of your incapacity, I encourage you to adopt a legal practice management software. This legal technology, like Smokeball, allows for a single source of truth for all client documents and information. This means that a Custodian

# Modern Automation Examples

Person  Firm or Organization

Contact Name

Lead Type

Email

Phone

Address

Referral Type



Form Library

↑ Criminal/Felony

a folder Add a form/letter Request a form Manage Form Shortcuts

- Bankruptcy Forms
- Carrot Law
- Criminal
  - DUI
  - Felony
  - Misdemeanor
  - Expunge or Seal Criminal Record
  - Traffic
  - Favorites
- Family
  - Custody, Support & Visitation
  - General Family
    - Discovery
    - Favorites
    - Forms
    - QILDRO

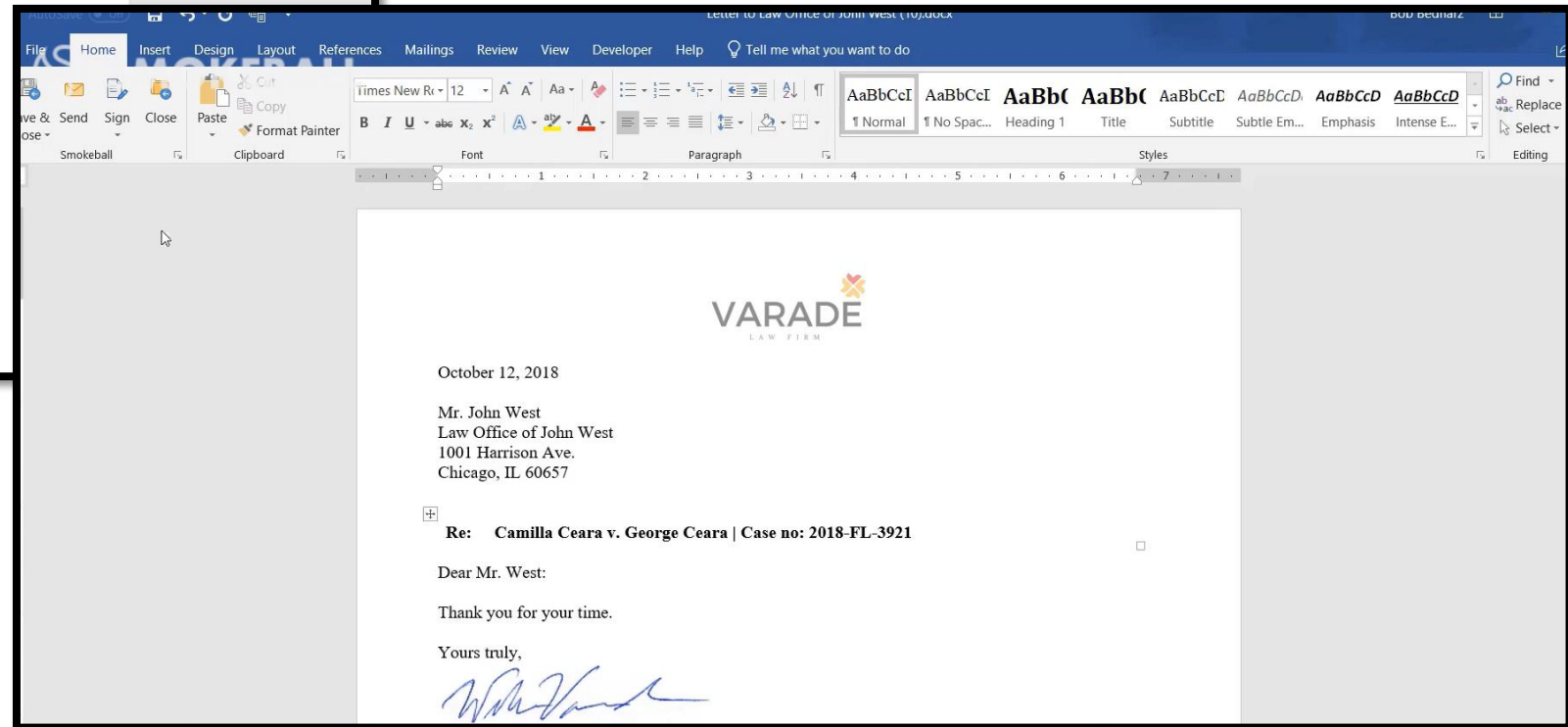
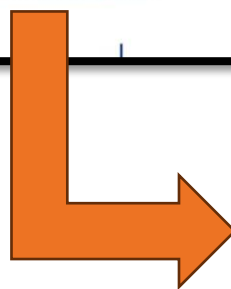
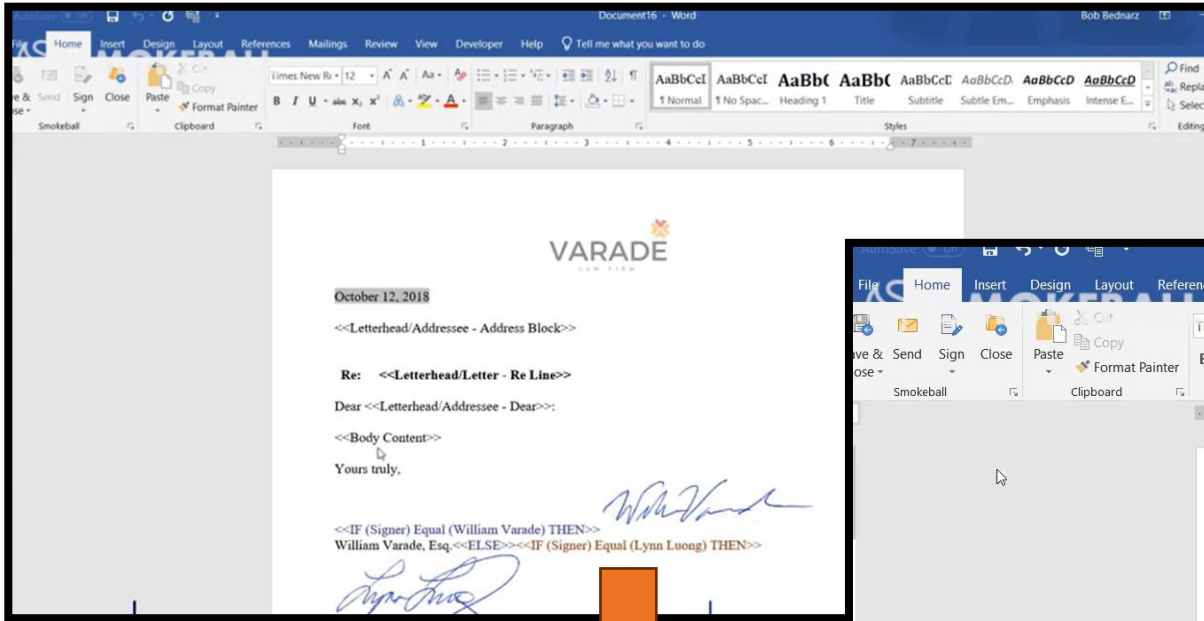
Name

- Court & Authority Forms
- Appearance
- Attachment to Subpoena Duces Tecum
- Client Intake Form
- Closing Letter
- Cover Sheet - Crimi
- Criminal Substitutio
- Defendant's Petition
- Demand for Speedy
- Engagement Letter
- Motion for Discover
- Motion to Produce
- Motion to Quash Ar
- Motion to Suppress
- Notice of Filing
- Notice of Motion
- Petition to Rescind Statutory Summary Suspensi
- Status Letter to Client

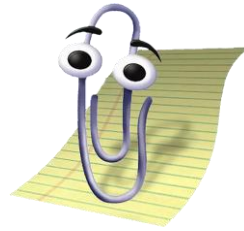
**Open**

- Open file location
- Open with container...
- Modify
- Rename
- Attach to Task
- Delete
- Import documents
- Show deleted

# Modern Automation Examples





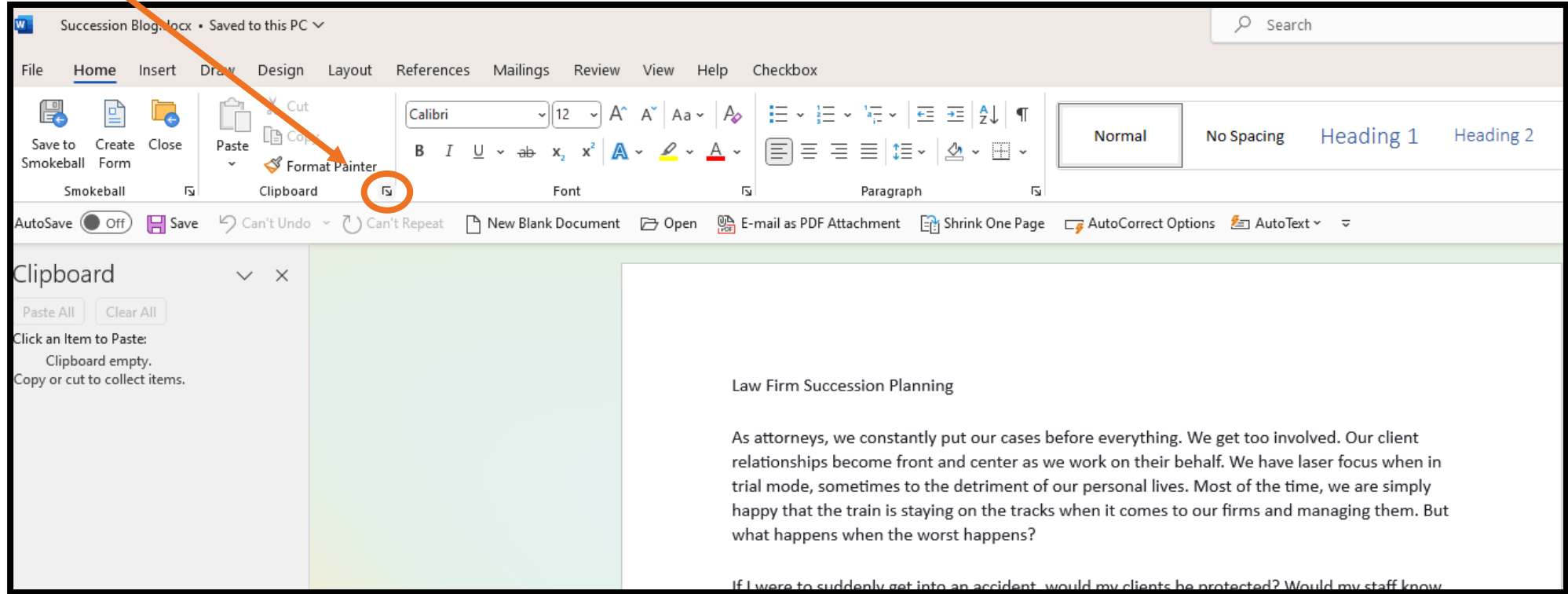


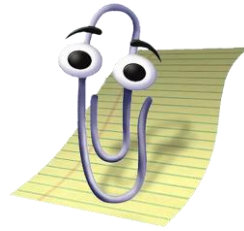
**Clipboard**

# What does it do?

- Temporarily stores up to 24 things that you cut or copy
- **Caveat: you need to turn it on!**
- You cannot store your clipboard; as soon as you log out, Word will erase your clippings
- This is ideal if you are researching and grabbing a bunch of different paragraphs/text but don't necessarily want to go and paste them into your doc yet
- Select Clear All to get rid of your clippings

# Clipboard





# Paste Options

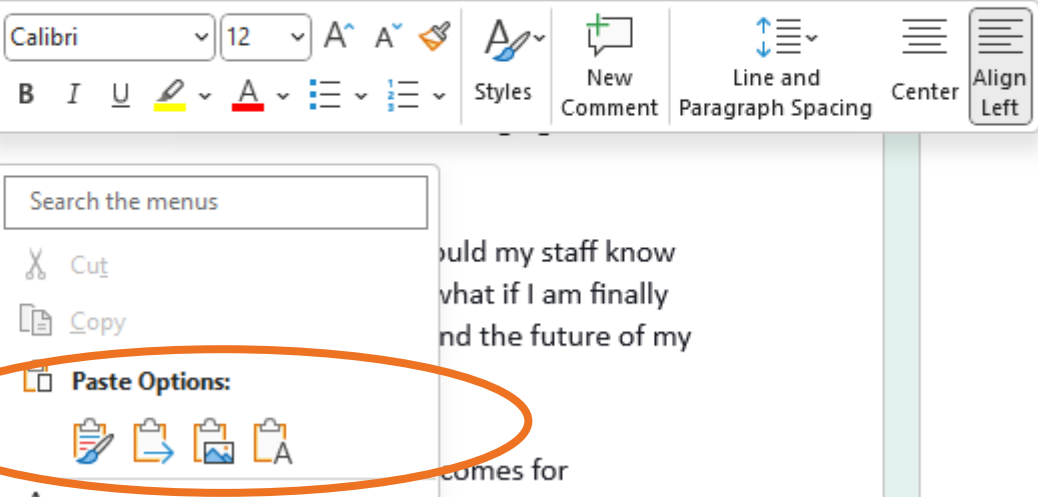
# Paste Options

Law Firm Succession Planning

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looking at my future with an eye toward re...  
law firm, look like?

Legal professionals need to plan for the we...  
ourselves and our practices. Whether it's a...  
comes for...  
rely, or it's a



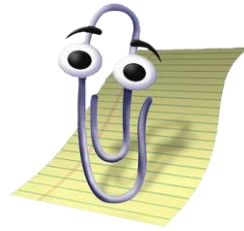
The image shows a Microsoft Word document with a ribbon and a context menu. The ribbon includes options for font (Calibri, 12), bold (B), italic (I), underline (U), text color (A), paragraph spacing, and alignment (Center, Align Left). The context menu is open, showing options for Cut, Copy, and Paste Options. The Paste Options section is highlighted with an orange oval, showing icons for Paste (Keep Source Formatting), Paste (Merge Formatting), Paste (Keep Text Only), and Paste (Text Only).

# What do they mean?

- First Option: Keep Source Formatting (K) – pastes exactly as you found it
- Merge Formatting (M) – to the extent that your doc is set up properly and has the correct default font, it will adopt the master font of the doc
- Picture (U) – don't use this; you won't be able to edit anything
- Keep Text Only (T) – will use whatever font is in the paragraph that you are pasting into, and will also remove extraneous formatting (might get rid of italics that you wanted to keep, etc.)

## **Merge Formatting is usually the ideal option**

Note: CTRL + V pastes in a specific way, and the default is Keep Source Formatting (but you can change this!)



# Final Tips

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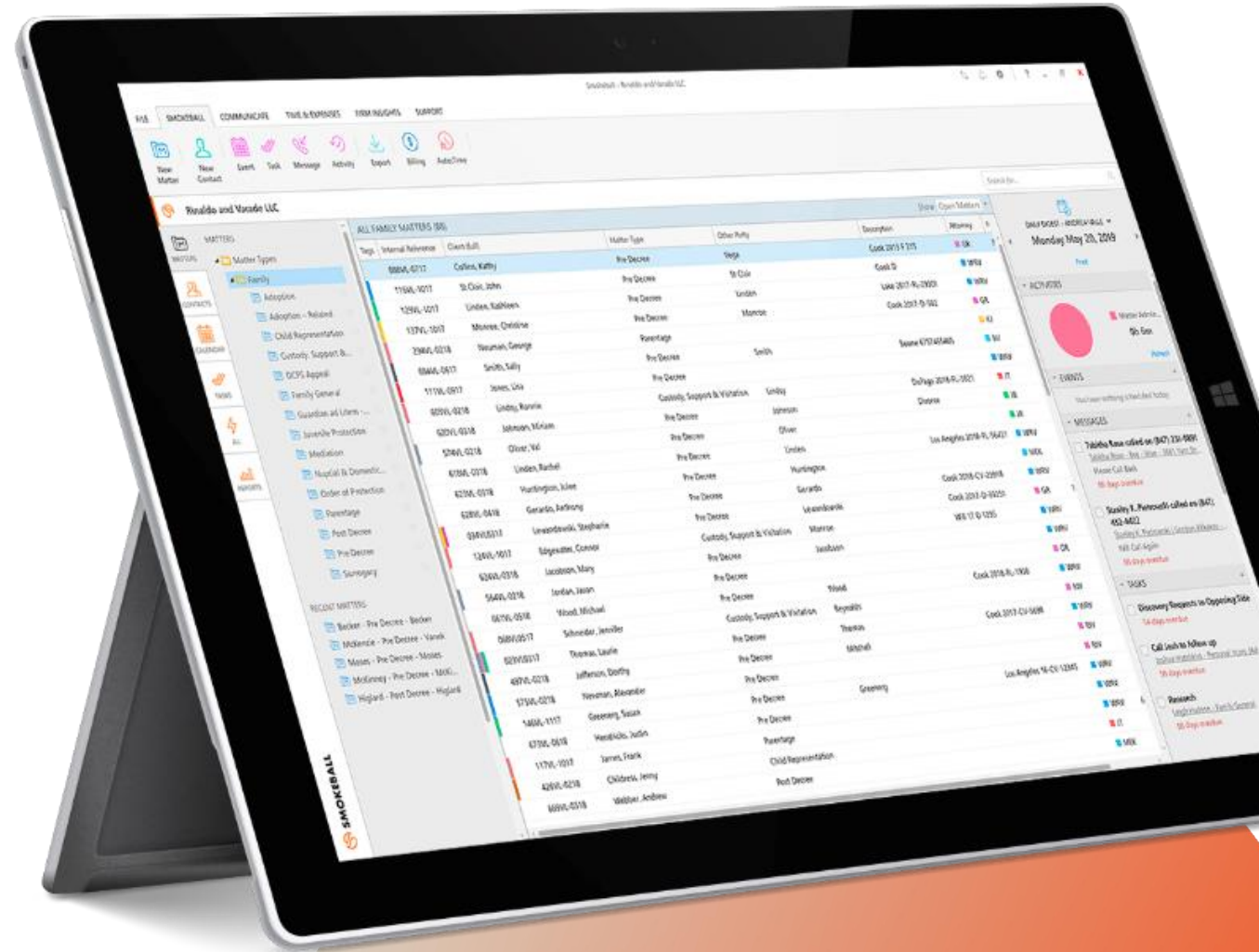
- Changing default font and spacing
- Securing documents (making them read-only)
- Removing metadata
- Deleting annoying shortcuts (© €), and adding better ones (§)
- Play around with the autocorrect tab!





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# Poll: Would you like to speak with a Smokeball representative about how Smokeball can help your firm grow?

If **yes**, one of our law firm specialists will follow up.



**YES, I'D  
LOVE TO**



**NO, NOT  
AT THIS TIME**



**ALREADY WITH  
SMOKEBALL**

**Questions?**



# Thanks for joining!



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