Technological Fluency, Project Management and Managing Clients

Jordan L. Couch
@jordancouch
jordan@palacelaw.com

Outline

- Project Management/Workflows
- Tech Competency/Fluency
- Managing Clients/The Client Perspective

Seriously, reach out to me with questions
Process before Tech

Workflow Systems
- Hundreds of options
- Countless books
- Brain Science
- Purpose is:
  - Centralize all tasks
  - Provide tangible accomplishments

Workflow Systems
To Do Lists
Workflow Systems

Eat That Frog

Data Data Data
2 Purposes

- Being able to understand and advocate for your clients
- Becoming a better more efficient lawyer
Being Better

Automating mundane tasks

Creating whole new delivery systems

Simple

Easy Communication

- Text to email
- Fax to email
- Client Portal

- 24/7 receptionists
- Instant messaging
- Video calls

Complex
Complex

Explore Workflow tools
- Trello
- EchoSign
- Rocket Matter
- Taskworld
- Adobe

Explore Communication tools
- Slack
- Skype
- Calendly
- Drift
- Live Chat for Businesses
Managing Clients

The service lawyers sell is not the product clients want to buy.

Managing Clients

- Make them feel heard
- Help them define their goal(s)
- Manage expectations
Managing Clients

Seriously, reach out to me with questions

Thank you and good luck!
I’m sure you’ll be awesome!

Jordan L. Couch  ‖  @jordanlcouch  ‖  jordan@palacelaw.com