



WSSFC 2025

Technology Track – Session 6

50 Tips in 50 Minutes

Presenters:

*Brent J. Hoeft, State Bar of Wisconsin, Madison
Nerino J. Petro, Jr., NerinoPetro LLC, Rockford, IL
Bryan Sims, Sims Law Firm, Ltd., Naperville, IL*

About the Presenters...

Brent J. Hoeft is the Practice Management Advisor for the State Bar of Wisconsin's Practice411™ Practice Management Program. He guides State Bar members on increasing law practice productivity and efficiency and advises on all things law practice management, including legal technology, information security practices, technology competence, employee management, policy and systems implementation, business development and marketing, and improving client relationship management. Prior to his time at the State Bar of Wisconsin, Brent was in private practice since 2006. In 2010, he founded Hoeft Law LLC, Wisconsin's first completely web-based virtual law firm providing legal services in business law, cybersecurity, and estate planning. Brent was also the founder of FirmLock Consulting, LLC, a cybersecurity behavior awareness consulting firm focusing on assisting solo and small law firms with cybersecurity training, education, and implementation of policies and procedures to better protect law firm data. Brent is a frequent presenter on legal technology, practice management, and cybersecurity. Since 2018, he has served as co-chair of the Technology Track for the Wisconsin Solo and Small Firm Conference (WSSFC) Planning Committee and had the honor of serving as the Conference Chair in 2022. Brent received his B.A. in Psychology from the University of Wisconsin-Eau Claire and his law degree from Cleveland State University College of Law. He lives in the Madison area with his family, where he enjoys mountain biking, camping, photography, and all things Wisconsin sports.

Nerino Petro (IL & WI) is President of the Erickson Group of companies in Rockford, IL and previously the Chief Information Officer for HolmstromKennedyPC. He served as the first Practice Management Advisor for the State Bar of Wisconsin's Practice411™ Law Office Management Assistance Program from 2006-2014. Licensed in Illinois and Wisconsin, Nerino uses his years of legal practice and experience being CEO/Senior Legal Technologist for CenCom Legal Technologies, to help lawyers and their staff deal with the technology and practice management issues confronting them. He has worked with numerous leading products including TimeMatters, NetDocuments, TABS® time, billing and accounting software, Practice Master® practice management software, and many others. Nerino was the ABA LPM Magazine Product Watch columnist through 2012 and is a regular contributor to other local, state, and national publications including the Illinois Bar Journal, Wisconsin Lawyer, Wisconsin InsideTrack and ABA GP|Solo Magazine. He has presented throughout the US and abroad and has served on the ABA TECHSHOW Planning Board from 2012-2014 and is serving again for the 2018 ABA TECHSHOW. He was the 2019 Chair for the State Bar of Wisconsin Solo & Small Firm Conference Planning Committee and is a longstanding co-chair of its Technology Track. Nerino was named to the inaugural Fastcase 50 list of the top legal techies in 2011. Nerino continues to provide technology consulting, training and practice management services to lawyers and firms throughout the United States through CenCom Technologies.

Bryan Sims is a shareholder and founder of Sims Law Firm, Ltd., where he concentrates his practice in the areas of commercial litigation, civil appeals, and real estate matters. He's a member of the Illinois Bar and the Northern District of Illinois Trial Bar and is also admitted to practice before the United States Supreme Court, the United State Court of Appeals for the Seventh Circuit, the United States courts in the Central District of Illinois, the Southern District of Illinois, and the Eastern District of Michigan. Bryan is a member of the Illinois State Bar Association, the American Bar Association, the DuPage County Bar Association, and the Will County Bar Association as well as a member of the ISBA Standing Committee on Legal Technology, where he has previously served as the chair three times and the newsletter editor for 5 years. Since 2006,

he has been a member ISBA Solo and Small Firm Conference Planning Committee. He is a past chair of the DuPage County Bar Association Law Practice Management and Technology Committee. Bryan has spoken on legal technology issues at the ISBA Solo and Small Firm Conferences, Wisconsin Solo and Small Firm Conferences, for the DuPage County Bar Association, the Chicago Bar Association, the Winnebago County Bar Association, the Lake County (Indiana) Bar Association, the Lake County (Illinois) Bar Association, the International Technology Law Association, National Business Institute and at ABA Techshow. Also, he was the featured speaker at the 2014 Oklahoma Solo and Small Firm Conference. Bryan has contributed to TechnoLawyer and was recognized as the 2005 TechnoLawyer of the Year. He has also written for PDA JD and regularly wrote reviews for Law Office Computing. Bryan blogs about the intersection between law and technology at www.theconnectedlawyer.com. Before entering private practice, Bryan worked as a judicial law clerk for Illinois Supreme Court Justice S. Louis Rathje. He has also worked as a staff attorney for the Second District of the Illinois Appellate Court. He is a 1993 Cum Laude graduate of Wheeling University and a 1996 Magna Cum Laude graduate of Loyola University Chicago School of Law. While in law school, Bryan served on the staff of both the Loyola Law Journal and the Loyola Consumer Law Reporter.

50 Tips & tricks



Brent Hoeft
Nerino Petro

Bryan Sims

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Artificial Intelligence Disclosure

These continuing legal education materials *may* have benefited from a bit of help from artificial intelligence (AI). By now, you've probably noticed AI is everywhere—drafting emails, summarizing depositions, and still struggling (with mixed success) to write a decent lawyer joke.

AI may have lent a digital hand in brainstorming, drafting, or polishing portions of these materials. But rest assured—every section was reviewed, redrafted, approved, and properly “lawyered-up” by real, live attorneys. Any flashes of brilliance are ours; any typos or odd turns of phrase we’ll gladly blame on the robots (who, despite their progress, are still not licensed to practice law).

So, enjoy the ride, learn something useful, and remember: the only intelligence earning CLE credit here is human.

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Nerino Petro's Tips

1. **ChatGPT** – Looking to make an email friendlier in tone or less formal?. Need help summarizing a memo or other document? Need to create an executive summary for a detailed document? According to ChatGPT itself “I draft, redline, research, and polish your chaos into brilliance—without whining about billable hours. Think of me as the associate who never eats, sleeps, or asks for partnership.” Before using, be sure to read, verify citations and be sure you’re familiar with your State’s rules on the use of AI.
2. **Windows Powertoys v 0.93.0**. Windows PowerToys help lawyers and staff work smarter by making everyday computer tasks faster and easier. You can neatly arrange windows, rename piles of files at once, create quick shortcuts, and launch apps instantly—basically less time wrestling with your computer and more time lawyering (or at least looking like you are). [Microsoft PowerToys: Utilities to customize Windows](#), [How to Use Microsoft PowerToys \[Beginners Guide\] 2025](#)
3. **Outlook Voting Buttons** – Stop drowning in endless “Reply All” chains when you’re trying to get a group decision. Outlook voting buttons let you send out quick yes/no or multiple-choice polls right from your email. Instead of a dozen conflicting responses, you’ll have one clear tally. The only downside? No option to hide the inevitable “Reply All” lawyer who just had to comment. [Use voting buttons in messages](#), and [Create a Scheduling Poll in Outlook for Windows](#).
4. **PhraseExpander** – If you find yourself typing the same sentences, paragraphs, or disclaimers over and over again, PhraseExpander is your new best friend. Create shortcuts for boilerplate text, and with just a couple keystrokes, drop in full paragraphs. Great for client emails, legal disclaimers, or that one sarcastic line you can’t resist reusing. [PhraseExpander](#) . For those of you using Mac check out [Typinator](#).
5. **USB-C Hub** – Modern laptops are slim, sleek, and... lacking ports. A USB-C hub lets you connect everything: monitors, thumb drives, ethernet, and that old scanner you swear still works. Keep one in your

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bag, one at your desk, and one at home, and you'll never be caught portless. [Best USB-C hubs and dongles: Add ports to your laptop or tablet](#) or [The 5 Best USB Hubs of 2025](#)

6. **Use a Smart Plug to Restart Your Modem & Router** – Tech support's first question: "Did you restart your router?" Instead of crawling under your desk, unplugging cords, and doing the router hokey-pokey, use a smart plug to power cycle from your phone. Bonus: you can schedule it to reboot at 3 AM so your internet is fresh before that early Zoom hearing. But be careful using it on your wireless router as you will lose your wireless network. [Kasa Smart Plug](#)
7. **Huuuge Power Banks** – Nothing says "prepared attorney" like whipping out a power bank the size of a small brick to keep your phone, tablet, and laptop alive. Sure, it might double as a paperweight, but in the middle of a deposition when the outlet is across the room, you'll be the hero. [The Best Power Banks for All Your Devices](#)
8. **iPadOS 26 – Real Multitasking at Last** – For years, the iPad was stuck in "one app at a time" mode, making it more toy than tool for serious work. With iPadOS 26, the iPad finally behaves like a real computer. You can resize and overlap multiple app windows, switch between sets of apps, and even hook up an external monitor for dual-screen productivity. In practice, this means you can have your notes, Zoom hearing, and email side-by-side instead of constantly swiping back and forth. For lawyers, it turns the iPad from a glorified Kindle into a real second workstation. [iPadOS 26 Transforms iPads: Now More Mac-Like for Ultimate Productivity!](#) And a video at iPadOS 26 [Multitasking Tips and Tricks](#).
9. **PowerPoint Design Ideas Pane** – Ever spend hours trying to make slides look less like they were designed in 1998? The Design Ideas pane in PowerPoint suggests layouts, fonts, and graphics that don't scream "clip art." With a click, you'll look like a design wizard—without hiring one. [Create professional slide layouts with Designer](#)
10. **Excel Text to Columns** – Stop manually cutting and pasting when someone sends you data in one giant column. Text to Columns splits it into usable fields—names, addresses, dates, whatever. Think of it as Excel's version of "divide and conquer." Split text into different columns

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with the [Convert Text to Columns Wizard](#) and [Excel Text To Columns Feature to Split a Column of Text Values. Excel Magic Trick 1905](#) .

11. **Dodge Windows 11 Hardware Requirements (flyoobe bypass)** – Microsoft wants shiny new hardware, but your old laptop still runs fine. There are ways (let's call them “creative workarounds”) to bypass Windows 11's strict requirements. Just remember: unsupported hardware might be riskier, but hey, so is ignoring discovery deadlines. [Ditching Windows 10? Here's how I installed Windows 11, removed AI, and stripped out unnecessary features using Flyoobe](#) .
12. **Anker Prime 6-in-1 USB-C Charging Station** – Lawyers travel with more gadgets than Batman. Anker's multi-device charging station means one plug powers your phone, laptop, tablet, earbuds, and more. Throw it in your bag and leave the cable spaghetti at home. [Anker Prime 6-in-1 Charging Station \(140W\)](#) .
13. **BitLocker: Protect Your Data** – Lost laptop? Without encryption, your client files could be tomorrow's headline. BitLocker is built into Windows and encrypts your drives so that only you (and hopefully not a hacker) can access the data. It's like putting a padlock on your briefcase—only digital. [Newbie's guide to Windows BitLocker: Why you need it and how to set it up](#) and [Device Encryption in Windows](#).
14. **Use Windows Shortcuts to Save Time** – CTRL+C, CTRL+V are just the beginning. Windows shortcuts can shave minutes off daily tasks, which adds up to hours. Learn a few, and you'll look like a magician in front of your staff (or at least less like you're hunting and pecking at the keyboard). [Keyboard shortcuts in Windows](#) and [Want to Master Windows 11? Start With These 73 Keyboard Shortcuts](#).
15. **“F*%k You, Pay Me”** – Mike Monteiro – Not really a tech tool, but every lawyer should watch this classic talk on why you must value your work and insist on getting paid. It's blunt, funny, and painfully true. See it on Vimeo at [2011/03 Mike Monteiro | F*ck You. Pay Me.](#)
16. **Listen More Than You Talk** – Old-school advice, but still a winning tech tip. Whether with clients, staff, or opposing counsel, shutting up and listening saves time, reveals strategy, and occasionally prevents you from saying something you'll regret in writing. [Two Ears, One Mouth](#).

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[The Hidden Golden Ratio](#) and video at [Ernesto Sirolli: Do you want to help someone? Shut up and listen!](#)

17. **Turn on Windows Clipboard History** – Copy and paste addicts, rejoice. Windows Clipboard History remembers the last 25 things you copied so you can paste them again. Type the Windows logo key  + V and your clipboard superpowers activate. It's like having a time machine for your CTRL+C habit. [Using the clipboard](#)
18. **iPad as a Second Monitor** – With Apple's Sidecar feature, your iPad becomes a portable second monitor for your Mac. Great for multitasking in court, at the office, or while pretending to watch your kid's soccer game. [Use an iPad as a second display for a Mac](#). For Mac, Windows and Android, check out [Duet Display](#) or [Space desk](#).
19. **Start11** – Hate Windows 11's new Start menu? Start11 brings back the classic look you loved (and knew how to use). Sometimes the best tech tip is just making your computer stop annoying you. [Start11™](#)
20. **Undo Word's Auto Save to the Cloud** – Word now wants to save everything to OneDrive by default. That might not be ideal for confidential client work. You can change the setting so documents save locally first, and you control what goes to the cloud. Old-school, but safer. [How to Revert Word's New Automatic Cloud Save Settings](#)

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Bryan Sims Tips

1. **Ctrl+Shift+T:** Have you ever closed a tab in your web browser and then immediately realized that you still need something from that tab. If so, this keyboard shortcut will save you. Simply press Ctrl+Shift+T and that recently closed tab will reappear.
2. **Windows Key and Start Typing:** For reasons that I don't understand Microsoft wants you to use their search bar and to store it in your task bar. That space is precious to me and there is no reason to have the search bar there. If you want to search for something, hit the Windows key and start typing.
3. **Windows Key+Arrow:** Windows allows you to easily divide your screen into halves, quarters, or other arrangements. This is especially useful if you are using a large monitor. Simply press the Windows key and one of the arrow keys to move your active window to that portion of your screen.
4. **Windows Key+V:** Have you ever wished that you could paste the information that you copied like three copies ago? Windows lets you do that. Press Windows key and V and Windows will bring up your paste history. If you have never enabled this before, you will have to enable this the first time you use it.
5. **Windows Key+L:** If you walk away from your computer, you need to consider your surroundings and whether you should lock your computer to prevent unauthorized access. Fortunately, Windows lets you do this with a simple keystroke. Windows key and L.
6. **Ctrl+Spacebar:** Do you have formatting in Word that you want to get rid of? Simply select the affected text and press Ctrl and the Spacebar. This removes the formatting and almost always works.
7. **Ctrl+L:** One of the things I hate using my mouse for is to click on the address bar in my web browser. Fortunately, the keyboard shortcut Ctrl+L takes you to your browser's address bar. No mouse needed.

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- 8. Phone Link:** This is a feature that has been in Windows for years, but no one talks about. Phone Link is an app that allows you to connect your cell phone with your computer allowing you to send and receive text messages from your computer rather than your phone. It also provides you easy access to the pictures you take on your phone.
- 9. Focus Sessions:** This is the Windows version of the Pomodoro Technique. You can set up your Focus Session controls in Focus Settings. Once you do so, you can start a Focus Session from your Windows clock. When you do, Focus Sessions sets your computer to do not disturb for the length of your session. If music helps you do focused work, you can also connect your Focus Sessions to your Spotify Account.
- 10. Use a Gear Bag:** We tend to carry around a number of things in our computer bag. Items such as earbuds, chargers, cables, dongles, etc. Pick up a gear bag to carry these items in, allowing you to keep them in one place and making them easy to find or retrieve.
- 11. Logitech ERGO M575:** A good friend of mine tried for years to get me to try this trackball. I always resisted because I didn't like trackballs. One day I gave in to him and tried it. In less than a week I was hooked. This trackball works great and bothers my hand less.
- 12. Microsoft To Do:** If you are not using an electronic To Do app, try Microsoft To Do. If you have Office 365 with the programs, it's included in your subscription and it is a powerful To Do program.
- 13. Use Cross References in Word:** Word has the ability to cross reference other paragraph numbers, other pages, and many other things. If you use this ability, these numbers automatically update when you make changes to your document. This reduces errors and makes your life easier.
- 14. Use a Bluetooth Headset with your Phone:** Lots of people do this with their cell phones, but did you know that many modern desk phones have this capability as well? If you have a desk phone and it's relatively modern, check and see if it has Bluetooth capabilities. If so, this means you can talk on your phone without being tied to your desk.
- 15. Mile IQ:** This app tracks the trips you make in your car, allows you to manually identify which ones are business related, and then learns to

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automatically recognize these trips. What this means is that you can easily get a monthly report of all of the business miles that you have driven.

- 16. Locale:** This is an app for your phone. It works only on Android. However, it allows you to automatically control your phone based on your location (or a number of other triggers, if you want). Once you set it up for a location, you don't have to think about it again. When I go to court (or a number of other places) I know that my phone will switch to vibrate only while I am there and turn the ringer back on once I leave.
- 17. On the Clock:** This company provides relatively robust time tracking for your employees as a very reasonable price. I used it when I had an employee and was always happy with the service. Since then they have also added payroll as an additional service, if you want.
- 18. Monoprice.com:** I know a lot of use reflexively go to Amazon.com when we want to buy something. Amazon, however, does not always have the best price. Monoprice.com was created to sell technology related products to other businesses. Before buying something expensive, compare prices at Monoprice.
- 19. Explore Other PDF Programs:** It seems like we spend all day working in PDF files. By default, most people do so using Adobe Acrobat. There is nothing wrong with that if you like Acrobat. Personally, I had the user interface for Acrobat and I use an alternative program. There are lots to choose from. Consider giving one of the others a spin. Options include Foxit PDF, Power PDF Advanced, Nitro PDF, Bluebeam, and ABBYY FineReader. Some of these options are even less expensive than Acrobat.
- 20. Rename Files Sequentially:** Have you ever had a bunch of files that you needed to rename? Find your files in Windows Explorer. Then, select the desired files in the folder, press F2, and type a desired base name. Windows will automatically add a sequential number to each subsequent file in parentheses at the end of each name.

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Brent Hoeft's Tips

1. **Automate Appointment Scheduling:** Automating appointment scheduling can save valuable time and reduce the back-and-forth communication often involved in setting up meetings. Tools like Calendly (<https://calendly.com/>) or Microsoft Bookings (included with Microsoft 365 Business <https://www.microsoft.com/en-us/microsoft-365/business/scheduling-and-booking-app>) allow clients to book appointments based on your availability, ensuring that your schedule is always up-to-date and minimizing the risk of double bookings. This efficiency can lead to better client satisfaction and more streamlined operations.
2. **Use a Password Manager:** Using a password manager is crucial for maintaining strong security practices. It helps generate and store complex passwords for various accounts, reducing the risk of security breaches. By having all your passwords in one secure place, you can easily access them without the need to remember each one, ensuring that your sensitive information remains protected. Examples: www.bitwarden.com, www.1password.com, www.dashlane.com
3. **Build a Digital Office Manual:** A digital office manual serves as a comprehensive guide for your firm's processes and procedures. It ensures that all team members are on the same page and can quickly reference important information. This digital manual should not only include documents with written instructions but also video screen recording so that the exact process can be recorded and re-watched at any time. This can be particularly useful for onboarding new employees and maintaining consistency in your practice. To record your screen processes you can use Zoom Clips (https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0057723), Loom (<https://www.loom.com>), or Microsoft 365 Clipchamp (<https://clipchamp.com/en/>) .
4. **MFA Everywhere** - Implementing Multi-Factor Authentication (MFA) across all your accounts adds an extra layer of security. Even if a password is compromised, MFA requires additional verification,

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making it much harder for unauthorized users to gain access. This is a simple yet effective way to protect sensitive client information and maintain the integrity of your practice.

5. **Block Scheduling** - Block scheduling involves dedicating specific blocks of time to particular tasks or types of work. This method can help improve focus and productivity by minimizing distractions and allowing you to fully immerse yourself in one task at a time. It also helps in managing your workload more effectively and ensuring that important tasks are prioritized.
6. **Multiple Monitors for Productivity** - Using multiple monitors can significantly enhance your productivity by providing more screen real estate. This setup allows you to have multiple documents, emails, and applications open simultaneously, reducing the need to constantly switch between tabs. It can make tasks like legal research, document drafting, and case management more efficient. There are also portable options now available from add-on second screens designed for mobile use, to laptops that have second screens built-in. See: Asus Zenscreen <https://www.asus.com/us/displays-desktops/monitors/zenscreen/>; Viewsonic TD1655 <https://www.viewsonic.com/us/products/monitors/portable-monitors/td1655-15-6-portable-1080p-ips-touch-monitor-with-60w-usb-c-and-mini-hdmi.html>; Asus Zenbook Duo <https://www.asus.com/us/laptops/for-home/zenbook/asus-zenbook-duo-2024-ux8406/>; Lenovo Yoga Book 9i <https://www.lenovo.com/us/en/p/laptops/yoga/yoga-2-in-1-series/yoga-book-9i-gen-10-14-inch-intel/len101y0054>
7. **Use the Tech You Have (MS 365)** - Leveraging the technology you already have, such as Microsoft 365, can streamline your practice. MS 365 offers a suite of tools like Word, Excel, Teams, and OneDrive that can enhance collaboration, document management, and communication within your firm. But also exploring beyond these more well known products to discover applications like Bookings, Planner, OneNote, Clipchamp and more. Utilizing these tools to their full potential can lead to more efficient and organized operations.
8. **Document Automation** - Automating document creation and management can save time and reduce errors. Tools like Microsoft

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Word templates, Gavel (<https://www.gavel.io>), or Spellbook (<https://www.spellbook.legal>) can help you quickly generate standard documents, such as contracts or pleadings, with consistent formatting and content. This efficiency allows you to focus more on substantive legal work and less on administrative tasks.

9. **Practice Management Software** - Implementing practice management software can centralize your firm's operations. These platforms often include features for case management, billing, client communication, and document storage. By having all these functions in one place, you can improve organization, enhance client service, and streamline your workflow. See for example: Clio (www.clio.com), 8am Mycase (<https://www.mycase.com>), Smokeball (www.smokeball.com)
10. **Manage Expectations** - Managing client expectations is key to maintaining a positive attorney-client relationship. Clear communication about what clients can expect in terms of communication, outcomes, timelines, and costs helps build trust and reduces the likelihood of misunderstandings. Setting realistic expectations from the outset can lead to greater client satisfaction and fewer disputes.
11. **Automate Repetitive Tasks** - Tools like Zapier (<https://zapier.com>) and Microsoft Automate (<https://www.microsoft.com/en-us/power-platform/products/power-automate>) can help you automate repetitive tasks, such as data entry, email follow-ups, and document filing. By creating automated workflows, you can save time and reduce the risk of human error, allowing you to focus on more complex and value-added activities.
12. **Microsoft OneNote** - Microsoft OneNote (<https://www.microsoft.com/en-us/microsoft-365/onenote/digital-note-taking-app>) is a versatile tool for note-taking and organization. It allows you to create digital notebooks where you can store and organize notes, research, and client information. OneNote's search functionality makes it easy to find information quickly, and its integration with other MS 365 tools enhances collaboration and productivity.

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13. **Scheduling Polls in Outlook** - Using scheduling polls in Outlook can simplify the process of finding a suitable meeting time for multiple participants. By allowing everyone to indicate their availability, you can quickly identify the best time for a meeting without the need for lengthy email chains. This feature can save time and improve scheduling efficiency. See https://support.microsoft.com/en-us/office/create-a-poll-for-scheduling-a-meeting-in-outlook-0bc57fed-6916-4553-b659-62798cedc096#officeversion=microsoft_365 or in the alternative Doodle (www.doodle.com)
14. **Leverage AI to Improve Efficiency in Places Other Than Your Billable Work** - Much of the focus of generative AI is on using it for research, writing briefs and motions to be submitted to court, and other billable legal tasks. This is also the arena where we hear the horror stories of attorneys misusing AI and getting themselves into trouble. There are other areas of practice law where AI can be leveraged to save time and improve the services delivered to clients that are outside of the actual billable time and substantive legal work. Things like intake, client education, marketing, blog posts, podcast editing, billing, meeting summaries, chatbots, virtual receptionists, and more.
15. **Explore Alternative Billing Models** - Exploring alternative billing models, such as flat fees, contingency fees, or subscription services, can provide clients with more predictable and flexible payment options. This can enhance client satisfaction and potentially attract a broader client base. It also allows you to tailor your services to meet the specific needs of different clients and implement AI and other technology to improve processes and efficiency by focusing on the value of the services to the clients, rather than tying revenue to how long it takes to do the work.
16. **Automate Your Intake Process** - Automating your client intake process can streamline the onboarding of new clients. Online forms and automated workflows can collect and organize client information, schedule initial consultations, and generate engagement letters. This efficiency can lead to smoother client experiences and quicker case initiation.

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17. **Use MS Teams Instead of Email** - Using Microsoft Teams for internal communication can reduce the reliance on email and improve collaboration. Teams offers chat, video conferencing, file sharing, and integration with other MS 365 tools, making it easier to communicate and collaborate in real-time. This can lead to more efficient and effective teamwork. Using Teams for internal communications also helps improve cybersecurity because it helps to keep messages out of your inbox. The more happening in your email inbox the greater chance there is that you will fall for a malicious email.
18. **Implement E-Signatures** - Implementing e-signatures can expedite the signing of documents and reduce the need for physical paperwork. DocuSign (<https://www.docusign.com>) or Adobe Sign (<https://www.adobe.com/acrobat/business/sign.html>) allow clients to sign documents electronically, providing a secure and convenient way to handle signatures. This can speed up processes and improve client satisfaction. Most of the Practice Management Systems also include built-in e-signatures.
19. **MS Forms for Client Satisfaction Surveys** - Using Microsoft Forms (<https://www.microsoft.com/en-us/microsoft-365/online-surveys-polls-quizzes>) to create client satisfaction surveys can help you gather valuable feedback from your clients. This information can be used to identify areas for improvement and enhance your services. Regularly collecting and analyzing client feedback can lead to better client relationships and more successful practice. The forms can be automated to be sent out at a certain stage of the representation, and you are able to view summaries of all results as well as a spreadsheet in Excel for more in depth analysis.
20. **Upgrade to Windows 11** - Upgrading to Windows 11 is important as Windows 10 reaches its end of life. On October 15 Windows 10 will no longer receive updates, security patches or technical support. Failing to upgrade to Windows 11 will create security risks and vulnerabilities. Upgrading to Windows 11 ensures that you have the latest security patches and features, helping to protect your firm's data and improve overall efficiency