

2025 11 21 LIL What's on Your Desk

Friday, November 21, 2025 6:25 AM

I. Announcements

- Perspective/goal of the group
- Speakers for 2026; contact Michelle
- Site updates
- Schedule posted

— ideal CC
— outsource
Recept

II. Welcome

- objectives, and format Round
- Topics: ethics, Hypotheticals: Ethical dilemmas, tech adoption challenges, and administrative issues; training problems
- Top challenges

III. Introductions (5 min)

- Round 1: firm size; AI/tech use and goal: growing or static
- IV. Round 2: top challenge/solutions

— Q NAP
internet
storage

V. Ethics in Solo/Small Firm Practice (15 min)

- **Core Principles:** Confidentiality, competence, supervision, and professional conduct
- **Emerging Issues:** Ethics of AI and technology use, data privacy, virtual law practice, and social media
- **Practical Tips:** Ideal Client Matrix

III. Firm Administration & Management (10 min)

- **Standard Procedures:** Importance of consistent processes for efficiency and productivity
- **Roles & Duties:** Delegation, supervision of staff, and maintaining a crisis-free environment
- **Key Performance Criteria:** Billing, accounting, and client relationship management
- **Dashboard**
- **Training**

Drop Box

IV. Technology in Practice (15 min)

- **Essential Tools:** Practice management software, cloud-based systems, AI-driven research, automated billing; CRM; e-discovery
- **Security & Ethics:** Safeguarding client data, encryption, access control, and audit trails
- **Practical Applications:** Speech recognition, timekeeping, e-discovery, document review, and virtual jury analysis
- **Responsible Adoption:** Training, supervision, and carrier positions on AI use

V. Legal Updates & Hot Topics (10 min)

- Champagne v. Bozer