



**McLay**  
LEGAL  
CONSULTING

# Making the most of your technology for good legal practice

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Fiona McLay,  
McLay Legal Consulting

LPLC Webinar 26 July 2023

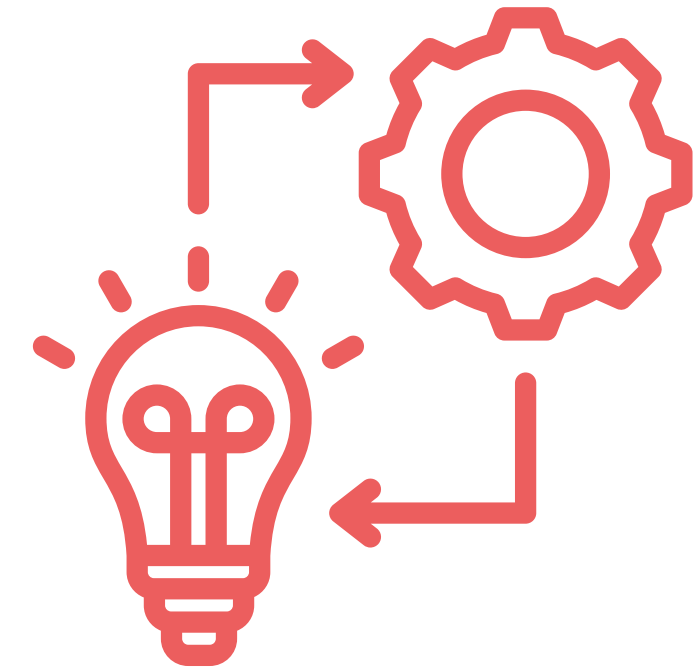




SIMPLE WAYS TO MAKE  
USE OF YOUR EXISTING  
TECH



USE GOOD DESIGN TO  
EMBED QUALITY INTO  
EVERYDAY TASKS



LOW COST IMPROVEMENT  
IDEAS YOU CAN  
IMPLEMENT NOW

# How I became a tech enabled lawyer

1994

Corrs Chambers  
Westgarth



2016

Harris Friedman,  
generalist firm Sydney  
CBD



JULY 2019

Freelance lawyer

Geeky Guru, CLI  
Legalpreneurs Lab

Graduate Diploma of Legal  
Business, College of Law



2001

Sparke Helmore.



2018

Digital Legal Practice  
and Innovation  
Masterclass, Centre for  
Legal Innovation (CLI)



# How I became a tech enabled lawyer



2021

Consultant Legal  
Project Management  
King & Wood  
Mallesons



2023

Published Tech enabled lawyer: a guide to making the most of the tools you have and spotting the tech you need

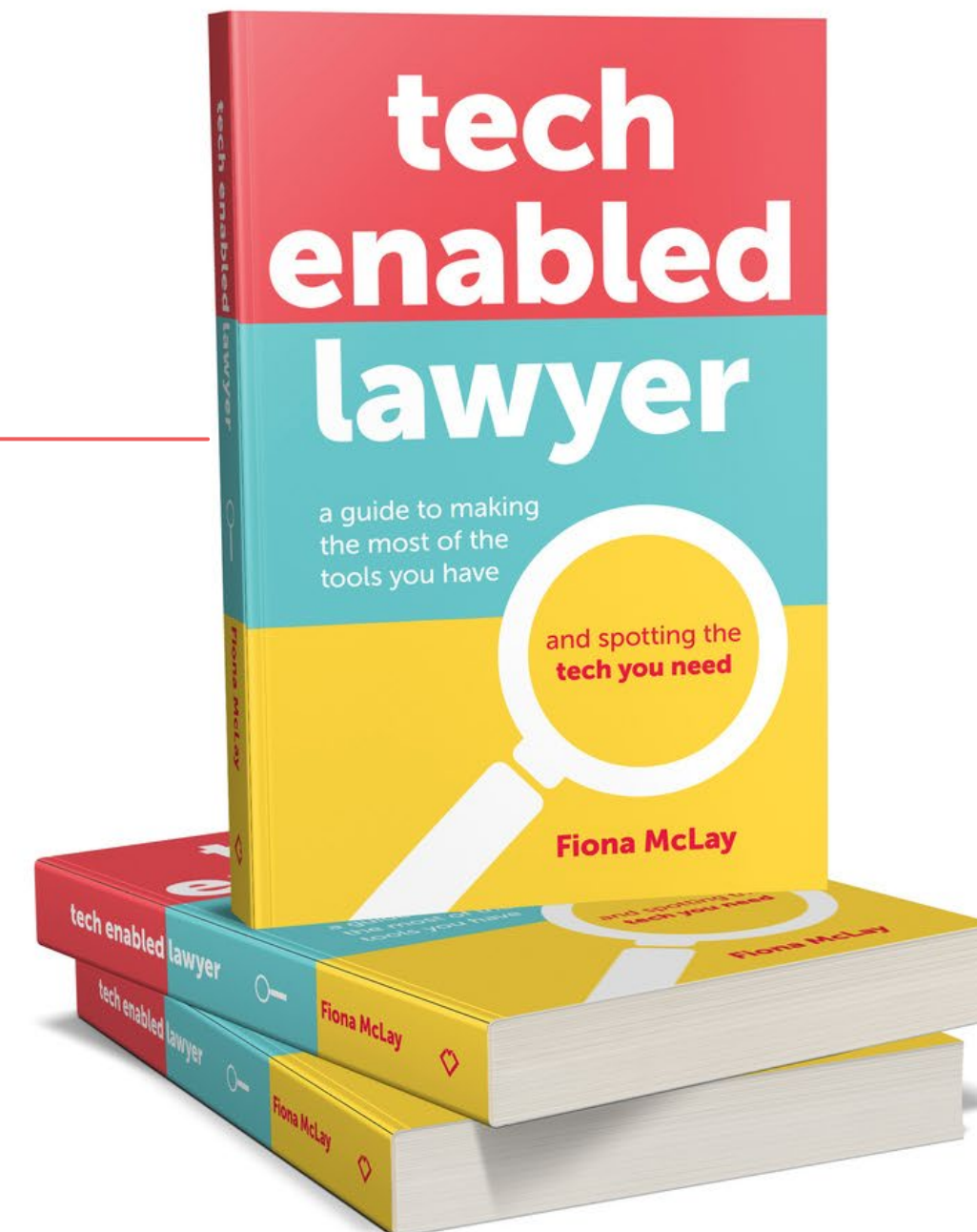
2019

Managing Counsel,  
Dispute Resolution,  
MLC Wealth (then part  
of NAB)



2022

Teaching Fellow  
College of Law,  
Fundamental  
Technologies



# Today

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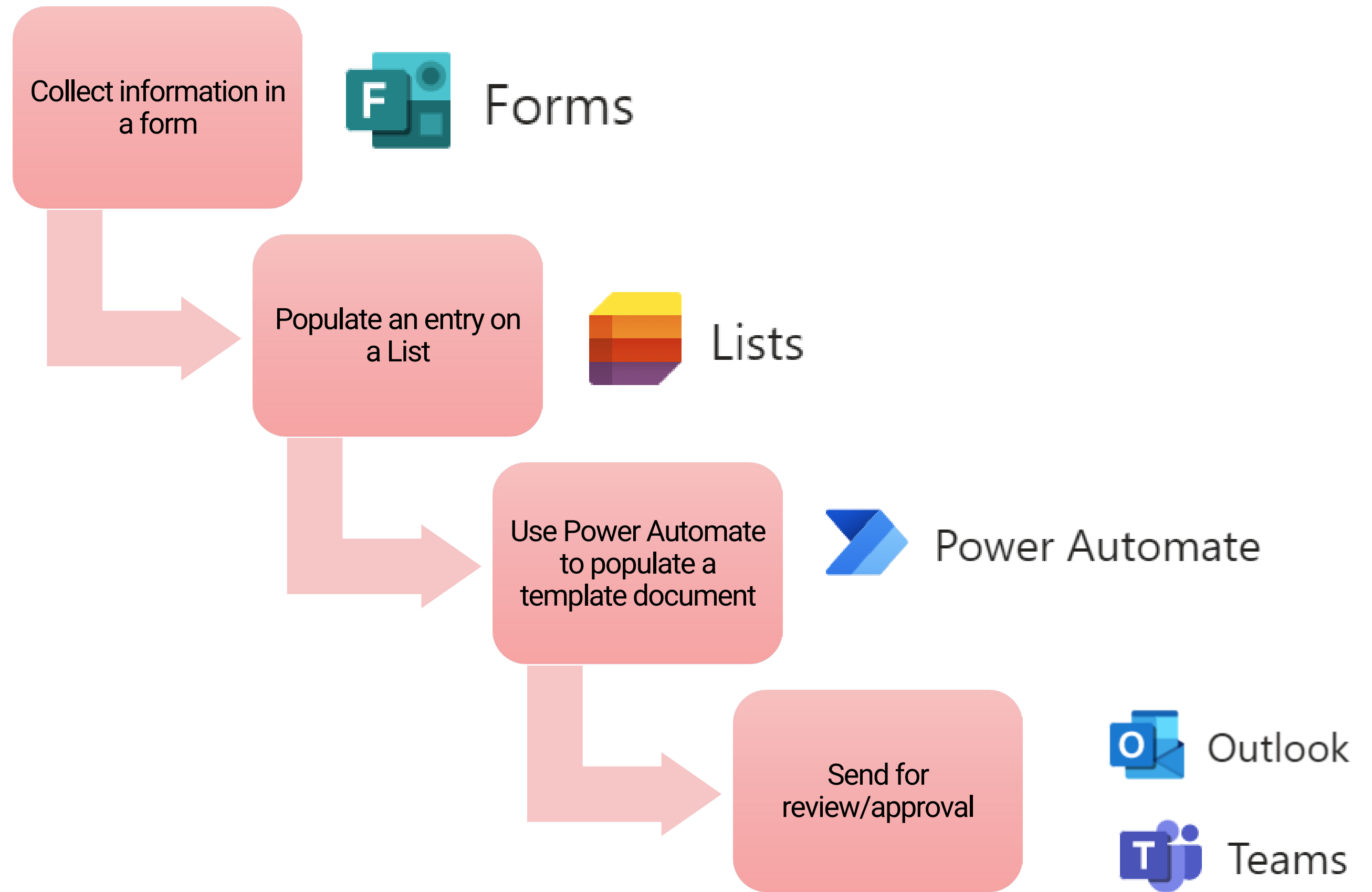
## **Making the most of tech for**

- Managing the retainer
- Communication
- Record keeping
- Good systems
- Managing key dates
- Keeping up to date

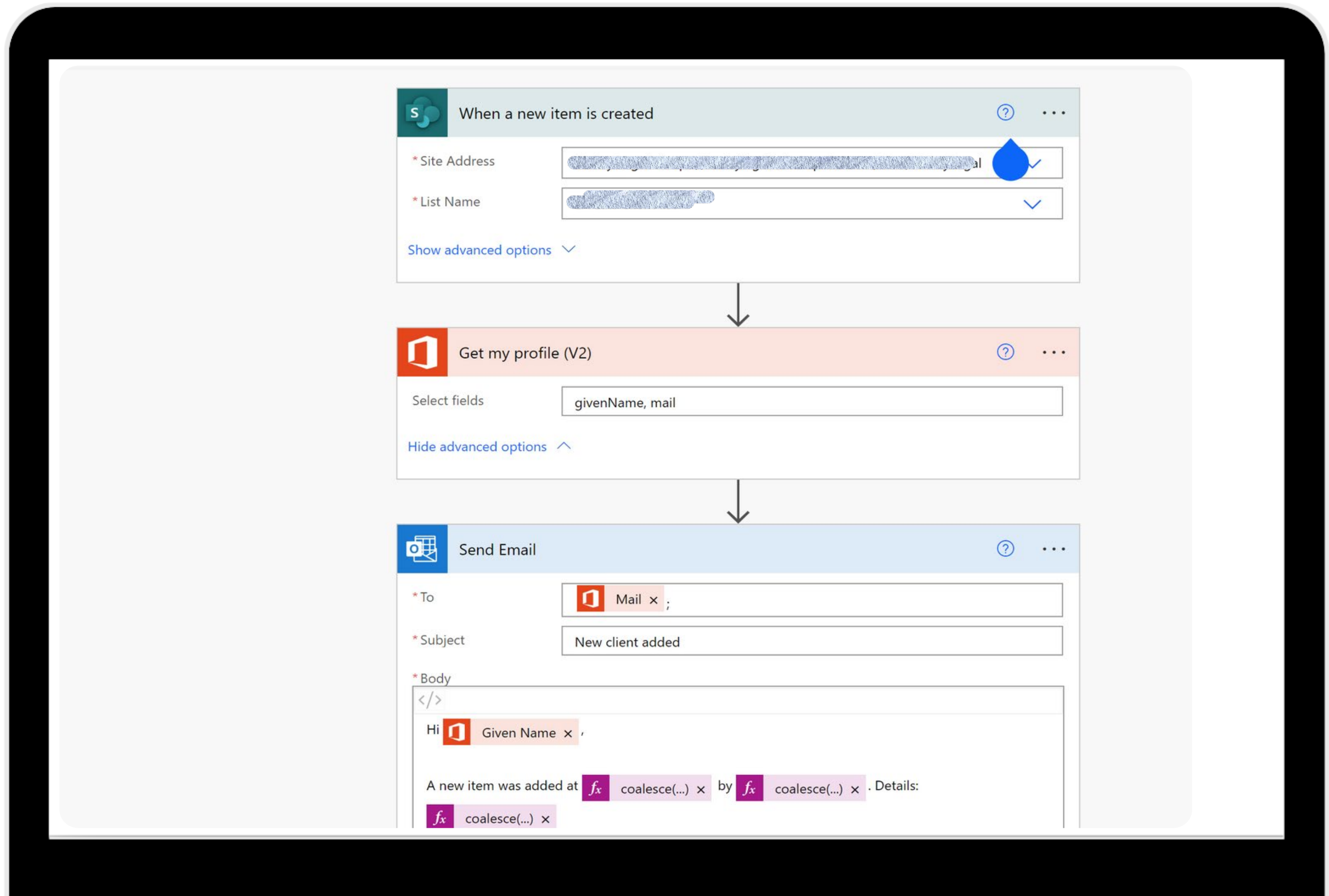
# Making the most of tech for managing the retainer



# Automated workflows in Microsoft 365



# Use Power Automate to build workflows





# Use Excel and standard “menu” to estimate costs

- 1 Use Excel spreadsheet to list standard stages for matter type and high-level tasks
- 2 Start with standard “price list” and adjust as appropriate
- 3 Estimate the total likely fees for the matter and sense check the outcome

	A	B	C	D	E	F
1	Fixed Fee proposal		Family law			
2	Client:		Jane Smith			
3	Matter No:		XXXX			
4	Stage	Description	Scope	Start date	Amount	Payment date for stage
5	1	Engagement	Consultation	12/09/2022	\$ 1,500	30/08/2022
6	2	Strategy	Plan	26/09/2022	\$ 1,000	26/09/2022
7			Consultation	10/10/2022		
8	3	Disclosure	Consultation with you	28/09/2022	\$ 3,000	12/10/2022
9			Collate documents	5/10/2022		
10			Review documents	12/10/2022		
11	4	Mediation	Preparation	28/10/2022	\$ 3,500	11/11/2022
12			Consultation with you	4/11/2022		
13			Attend	11/11/2022		
14	5	Settlement Agreement	Draft	11/12/2022	\$ 1,500	11/12/2022
15			Negotiation	25/12/2022		
16			File at Court	8/01/2023		
17					\$ 10,500	

Use standard stages

Complete the blue columns and amend as required

Calculate to align with projected completion of tasks for each stage

# Use visuals to communicate scope of work

- 1 Pull estimates from spreadsheet into a table in your retainer agreement
- 2 Customise the presentation to suit your client's needs
- 3 Use the due dates to generate calendar entries and automated reminders

Create a high level visual pathway to make it easy for your client to understand



Stage	Engagement	Disclosure	Mediation	Consent orders
Scope	Describe scope for stage 1	Describe scope for stage 2	Describe scope for stage 3	Describe scope for stage 4
Price	\$ 1,500.00	\$ 1,000.00	\$ 3,500.00	\$ 1,500.00
Payment date	30 August 2022	26 September 2022	11 November 2022	11 December 2022

# Use Lists to track leads, Basic CRM (Client relationship management)

Microsoft Lists

Search

+ New Edit in grid view Share Export Automate Integrate

All Items\* Info

My lists  
sample leads

Title	Location	Practice Area	Status	Est Value	Assigned to	Date	Est Close	Next Activity	Source	Referrer Name
Lead #1	Melbourne	Family	New	1,500	John Smith	4 days from now	August 09	Initial Consultation	Website	None
Lead #2	Geelong	Estate Planning	Follow-up	2,000	Mary Johnson	Monday at 09:30 AM	July 29	Phone Call	Referral	Emily Brown
Lead #3	Ballarat	Conveyancing	Active	1,800	David Lee	July 09	4 days from now	Document Review	Walk-in	None
Lead #4	Bendigo	Commercial	New	3,500	Sarah Chen	7 hours ago	August 04	Email Inquiry	Website	None
Lead #5	Melbourne	Family	Follow-up	1,200	John Smith	6 days ago	July 29	Follow-up Meeting	Walk-in	None
Lead #6	Geelong	Estate Planning	New	2,300	Mary Johnson	Yesterday at 04:30 PM	August 09	Initial Consultation	Website	None
Lead #7	Ballarat	Conveyancing	Active	1,600	David Lee	July 04	Yesterday at 02:00 PM	Contract review	Referral	Michael Green
Lead #8	Bendigo	Commercial	New	4,200	Sarah Chen	Monday at 10:30 AM	August 04	Phone Call	Existing client	None
Lead #9	Melbourne	Family	Follow-up	1,000	John Smith	July 09	4 days from now	Follow-up Email	Website	None
Lead #10	Geelong	Estate Planning	New	2,500	Mary Johnson	6 days ago	August 09	Initial Consultation	Walk-in	None
Lead #11	Ballarat	Conveyancing	Active	1,700	David Lee	June 30	6 days ago	Document Preparation	Referral	Peter White
Lead #12	Bendigo	Commercial	New	3,800	Sarah Chen	July 12	August 04	Email Inquiry	Website	None
Lead #14	Geelong	Estate Planning	New	2,800	Mary Johnson	July 11	August 09	Initial Consultation	Website	None
Lead #15	Ballarat	Conveyancing	Active	1,900	David Lee	June 29	6 days ago	Contract review	Website	None

# Use Lists to keep track

Microsoft Lists

Search this list

+ New Edit Edit in grid view Share Copy link Comment Delete Automate

Tech Enabled Law Firm  
Work progress tracker

Work item	Description	Category	Status	Est Value	Assigned to	Start date	Due date	Source	Last contact
F Wells	Property		Closed lost	\$10,000.00				Webinar	8/18/2022
K Black	Property	Family	Proposal sent	\$25,000.00		September 17		Social	10/1/2022
H Mount	Property		Closed Won	\$40,000.00		October 1		Previous client	10/11/2022
T. Smith	Property	Family	Lead	\$50,000.00	Fiona McLay	Today	November 25	Referred by Clare	10/31/2022

### Edit column

Learn more about column types and options.

Name \*

Category

Description

Type of work

Type

Choice

Choices \*

- Family
- Choice 2

+ Add Choice

Can add values manually

Default value

None

Use calculated value

More options

Edit all Copy link

### F Wells

Work item \*

F Wells

Description

Property

Category

Status

Closed lost

Priority

Select an option

Start date

Enter value here

Due date

Enter value here

Assigned to

Enter a name or email address

Notes

Enter value here

Est Value

10,000

Source

Webinar

Last contact

8/18/2022

Attachments

Add or remove attachments

### Comments

@mention or comment

Today

- You commented 18/8 Email Just now
- You commented 18/7 Called LMTRMC Just now
- You commented 18/6 DNA appointment. Called NA Just now
- You commented 10/6 Booked appointment Just now

Customise the columns

Complete the form to add items

Keep updates and notes on each item

# Use Lists to automate simple workflows

## Create a rule

Customize the condition by choosing a column, the value of the column, and who to notify.

When Status is Signed Agreement received ,  
send email to Assigned to .

< Previous

# Making the most of tech for **Communication**



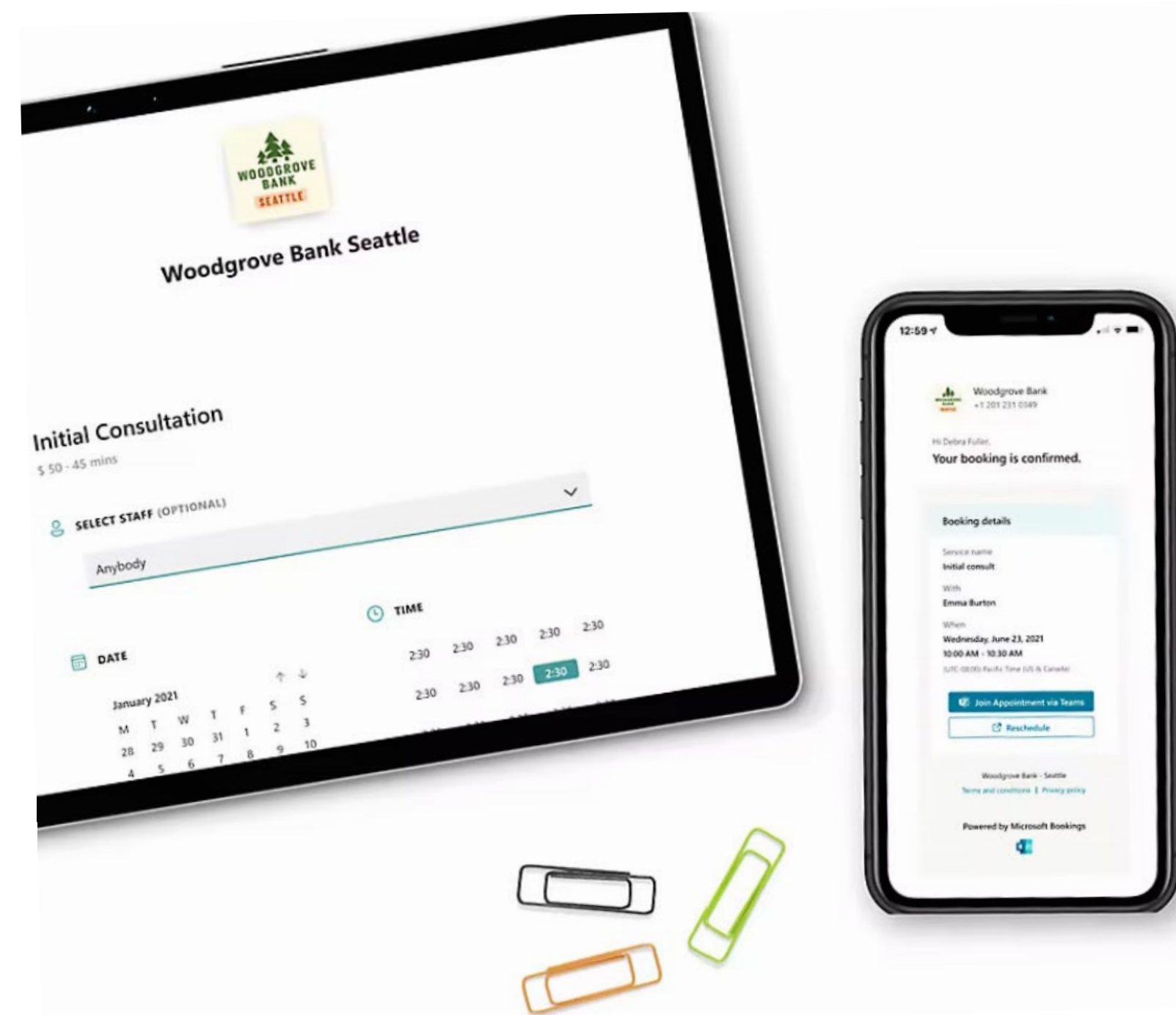
# Secure Client portals

- Secure client communications protect sensitive information and avoid complaints about privacy breaches
- Real time progress updates: can keep clients informed of status and reduce complaints from missed deadlines or disorganisation
- Regular case updates proactively manage client expectations, prevent misunderstandings, follow up outstanding instructions and reduce complaints about lack of information
- Minimise requests to re-send information that has already been provided



# Online appointment booking

- Enable clients to book a time with you online, reduce phone tag and scheduling conflicts
- Send automated reminders to clients, preventing complaints about forgotten appointments
- Collect key information via online form in advance of appointment to avoid slow manual data collection
- ⚠️ build in conflict checking mechanism before you collect confidential client information that might cause you to be conflicted if both sides of a dispute engage you



Source: Microsoft Bookings



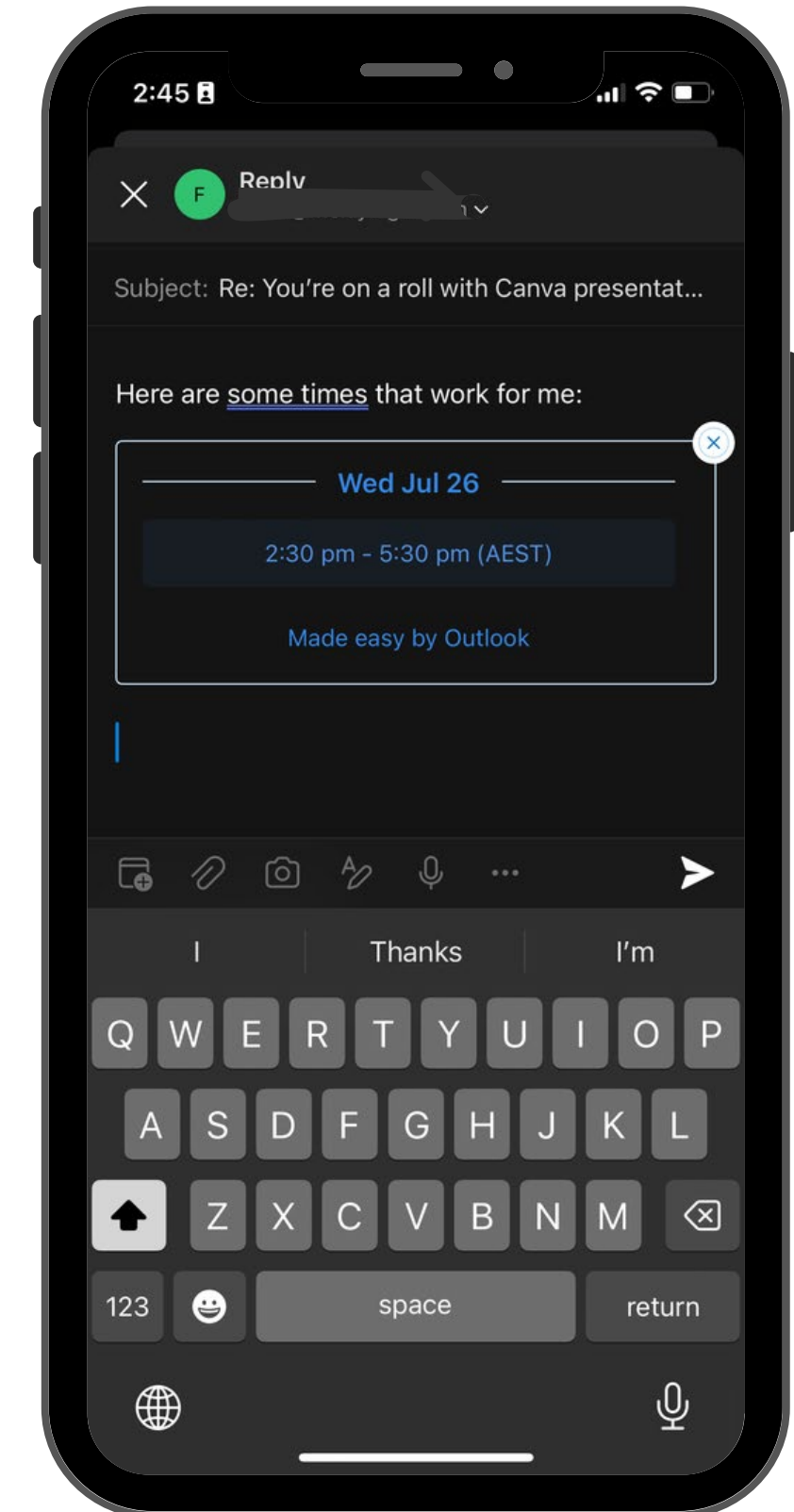
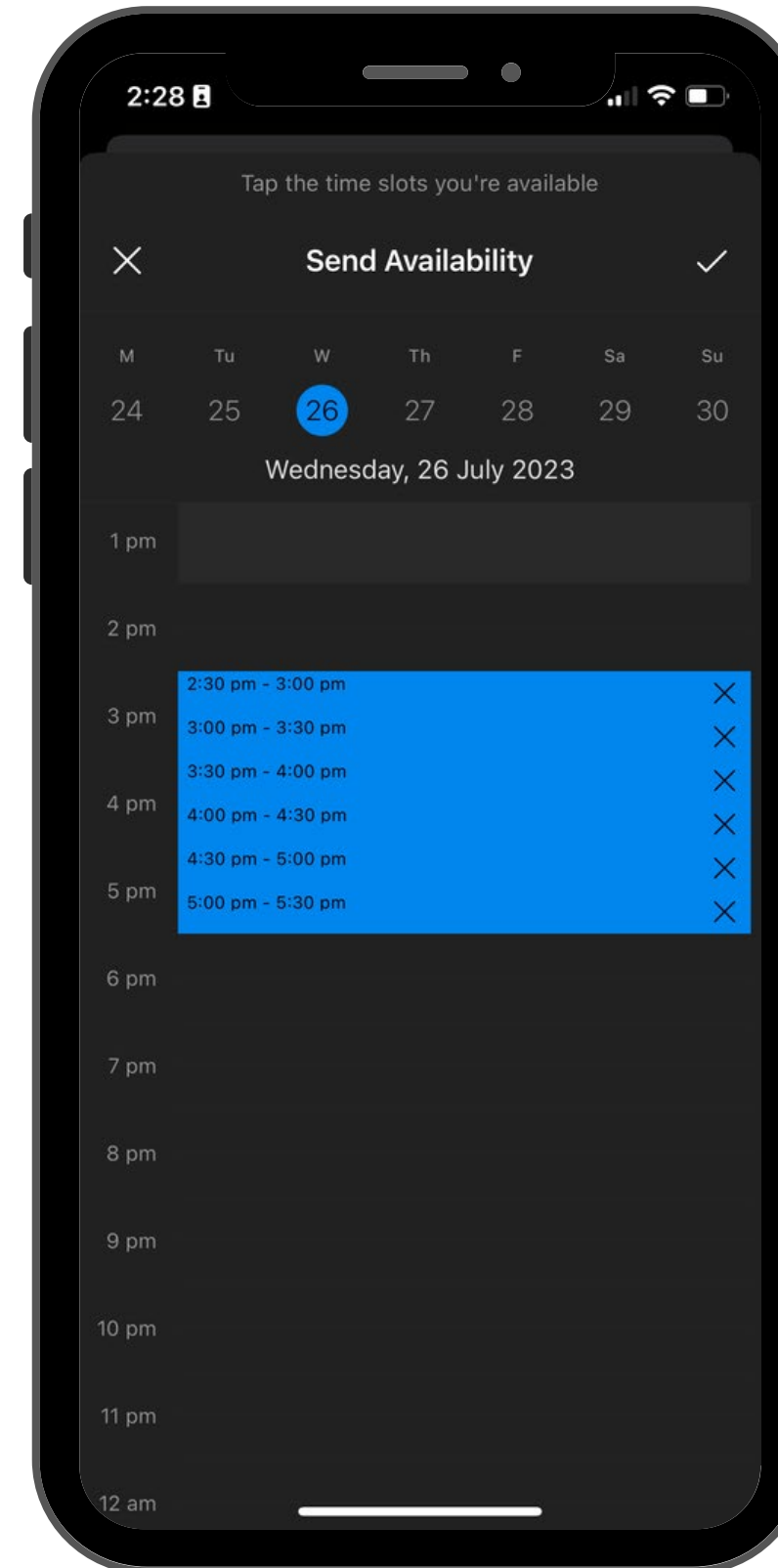
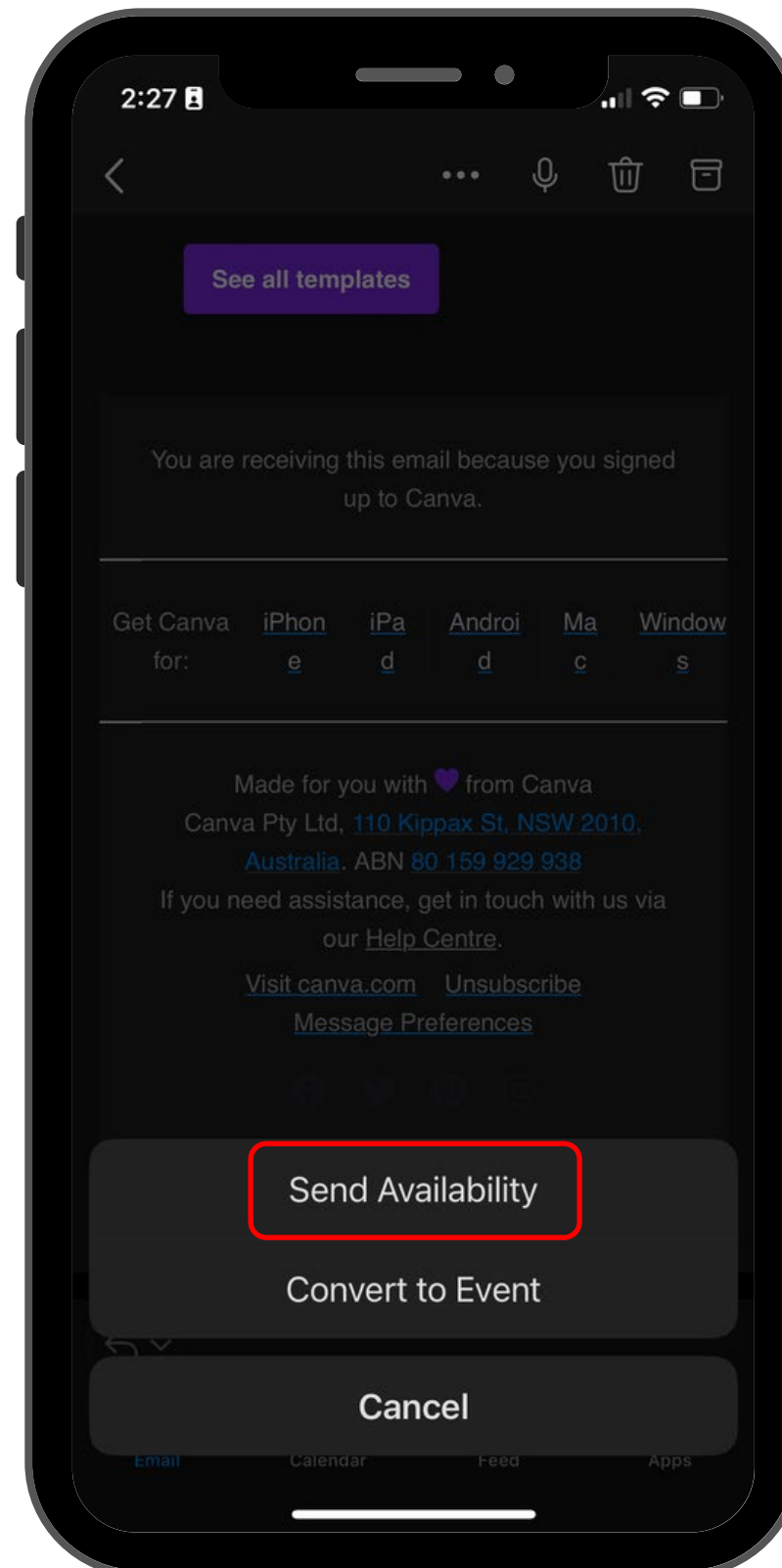
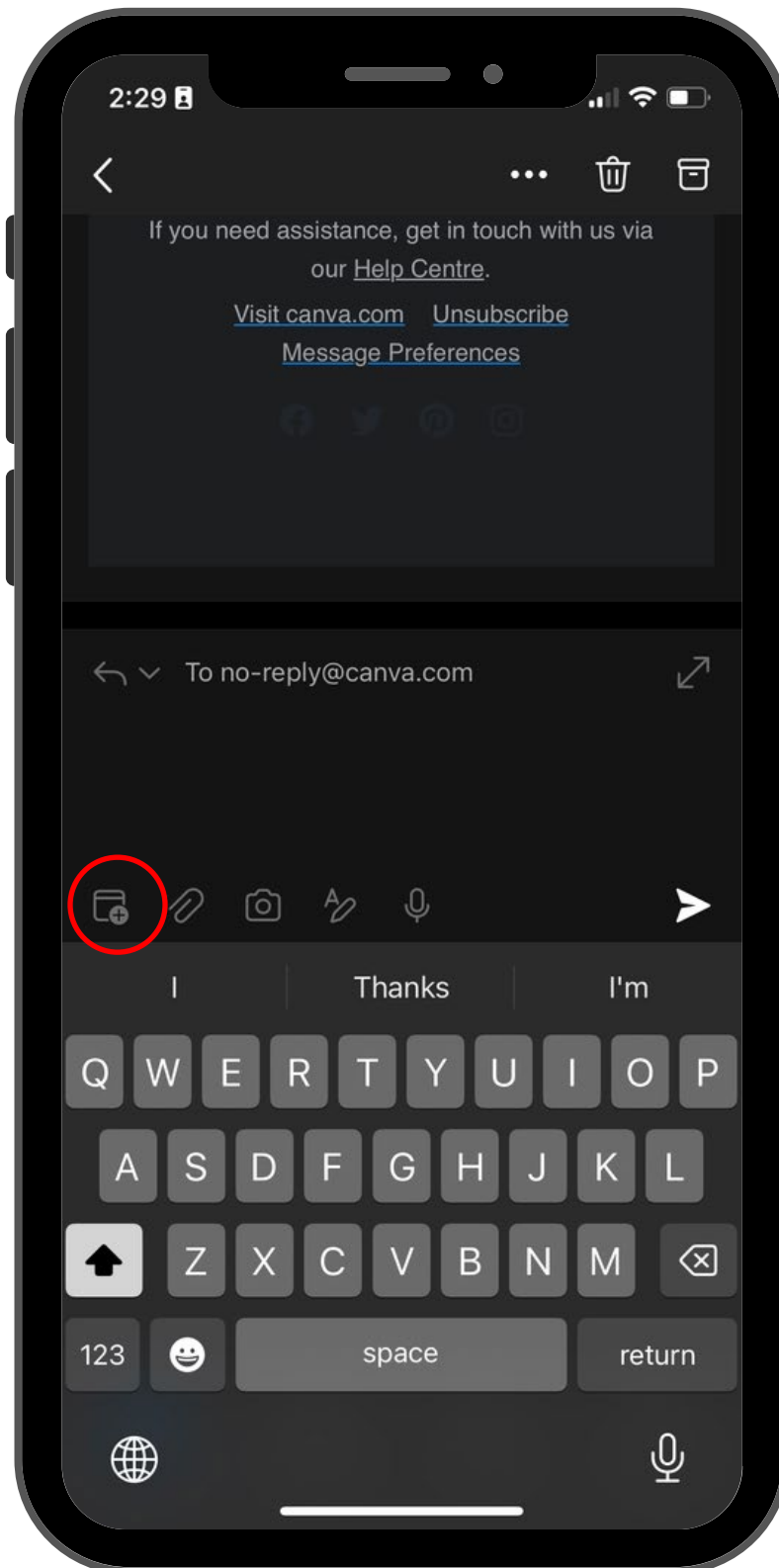
# Send availability from your mobile with Outlook app

1 Reply to an email click the calendar plus icon

2 Select Send Availability

3 Highlight available timeslots from your calendar

4 Your available times are in the draft reply



# Client satisfaction surveys

4. How likely are you to recommend us to a friend or colleague?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Not at all likely

Extremely likely

+  Choice  Text  Rating  Date

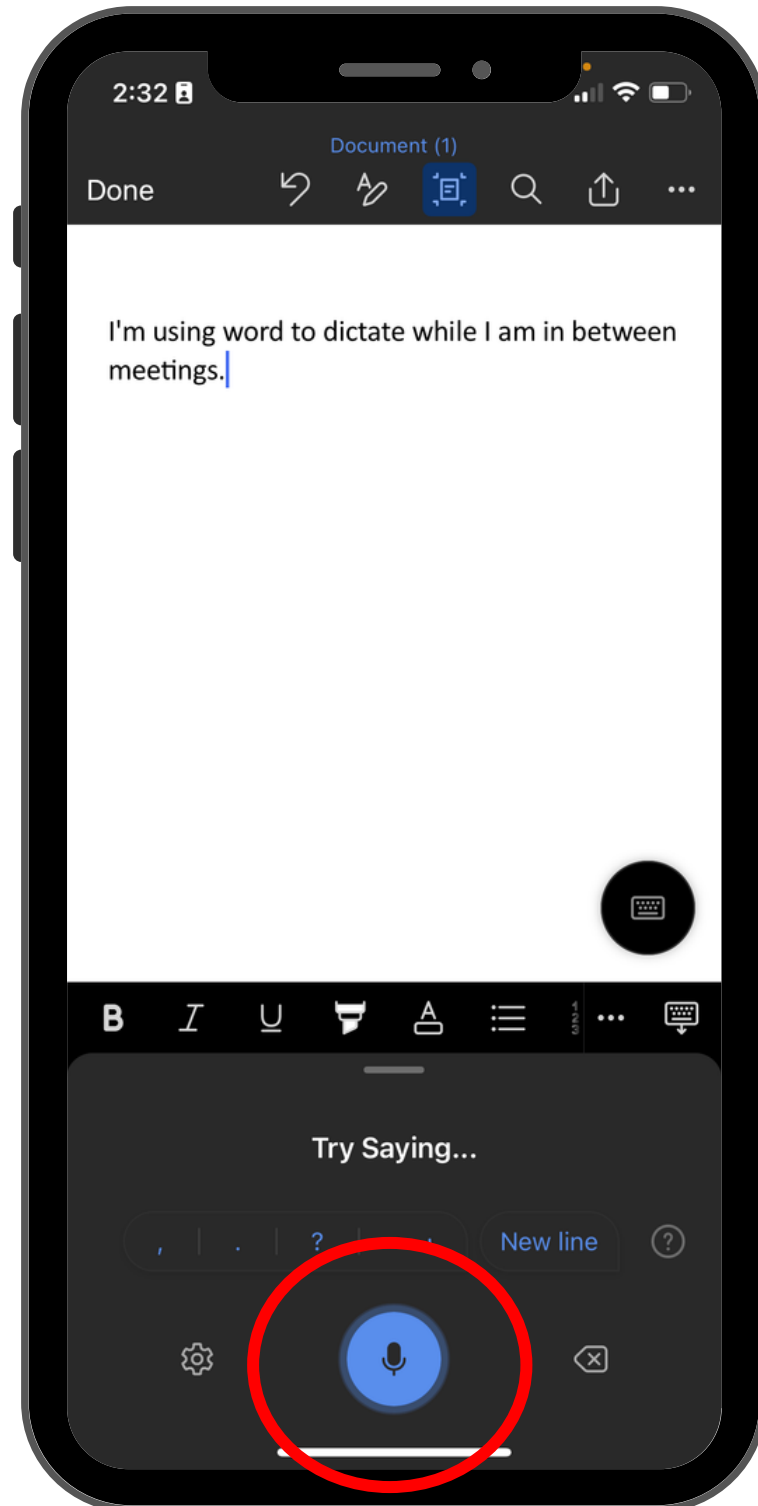
Recommended Add all ×

- Do you have any suggestions for us to improve future events?
- How likely are you to recommend this event to a friend or colleague?
- What did you like least about the event?
- What did you like most about the event?
- How satisfied were you with the event?

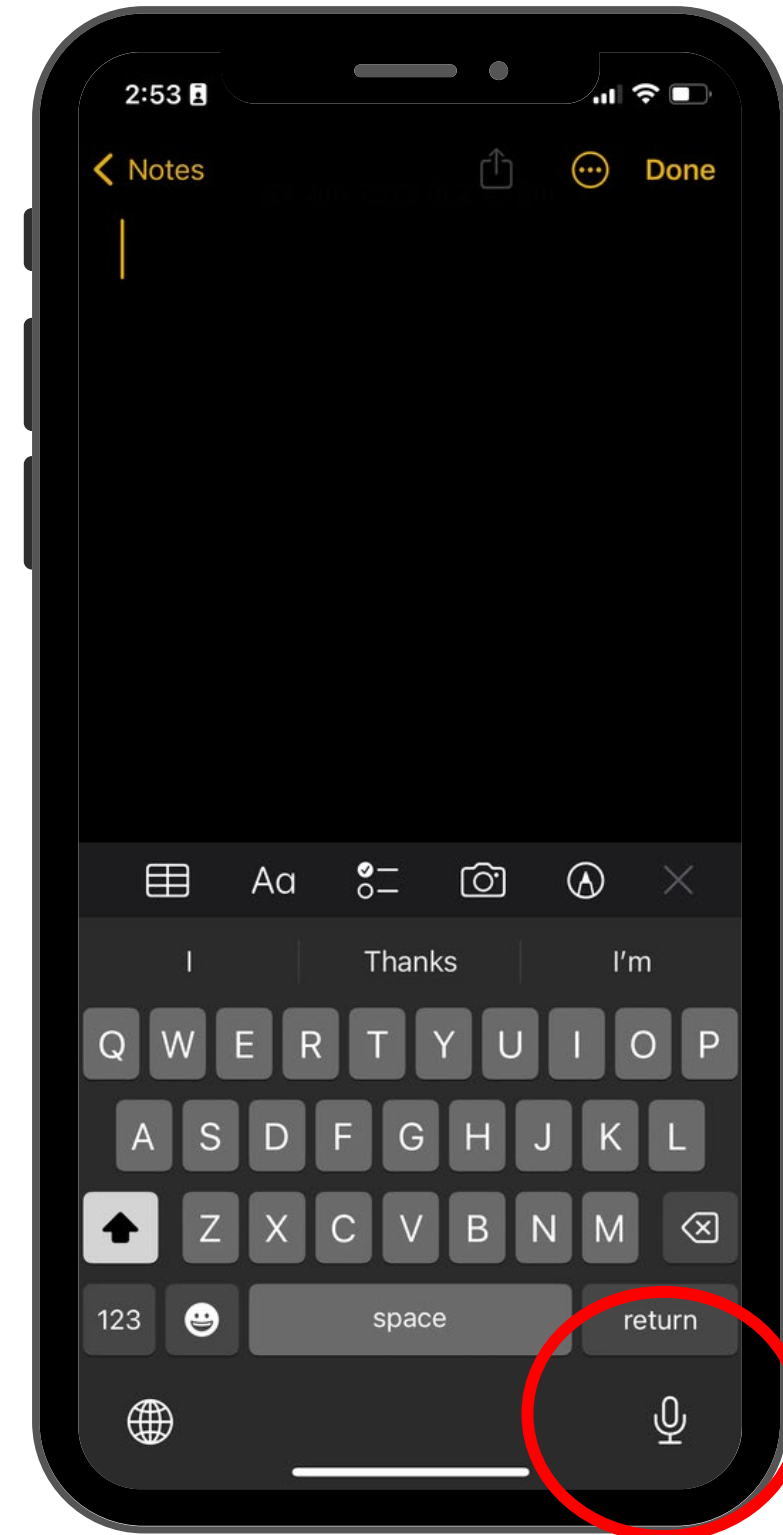
# Making the most of tech for Record keeping



# Dictate file notes when you are away from your desk



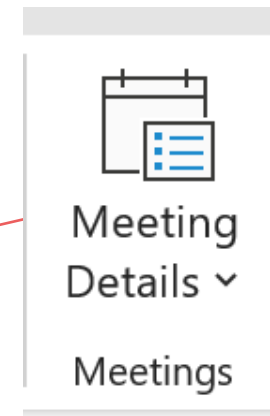
Microsoft Word app in built dictation



Notes app (for iPhone) also allows you to dictate

# Use OneNote for digital file notes

- 1 Insert Meeting details from Outlook
- 2 Default Template created in One Note from LPLC template option to add your brand logo
- 3 Optional ruled lines - select Draw | Format background
- 4 Many ways to capture content
  - Type, dictate or record a video
  - Handwrite on tablet and convert to text
  - Add images or pdf documents to mark up
- 5 Email page to save on the matter file or give directions



## LPLC workshop

Sunday, 16 July 2023 12:58 PM

**Meeting Date:** 17/07/2023 8:30 AM

**Location:** Legal Practitioners' Liability Committee (570 Bourke St, Melbourne Victoria 3000)

**Link to Outlook Item:** [click here](#)

+ **Invitation Message** (Expand)

**Participants** (Collapse)

 [Fiona McLay](#) (Meeting Organizer)

### Notes



### File Note

Date	Time Start	Time End	Units
------	------------	----------	-------

Matter	Matter No.
--------	------------

Type of meeting (e.g. Phone, Face to Face, Video Conference)

Location

Author

Attendees

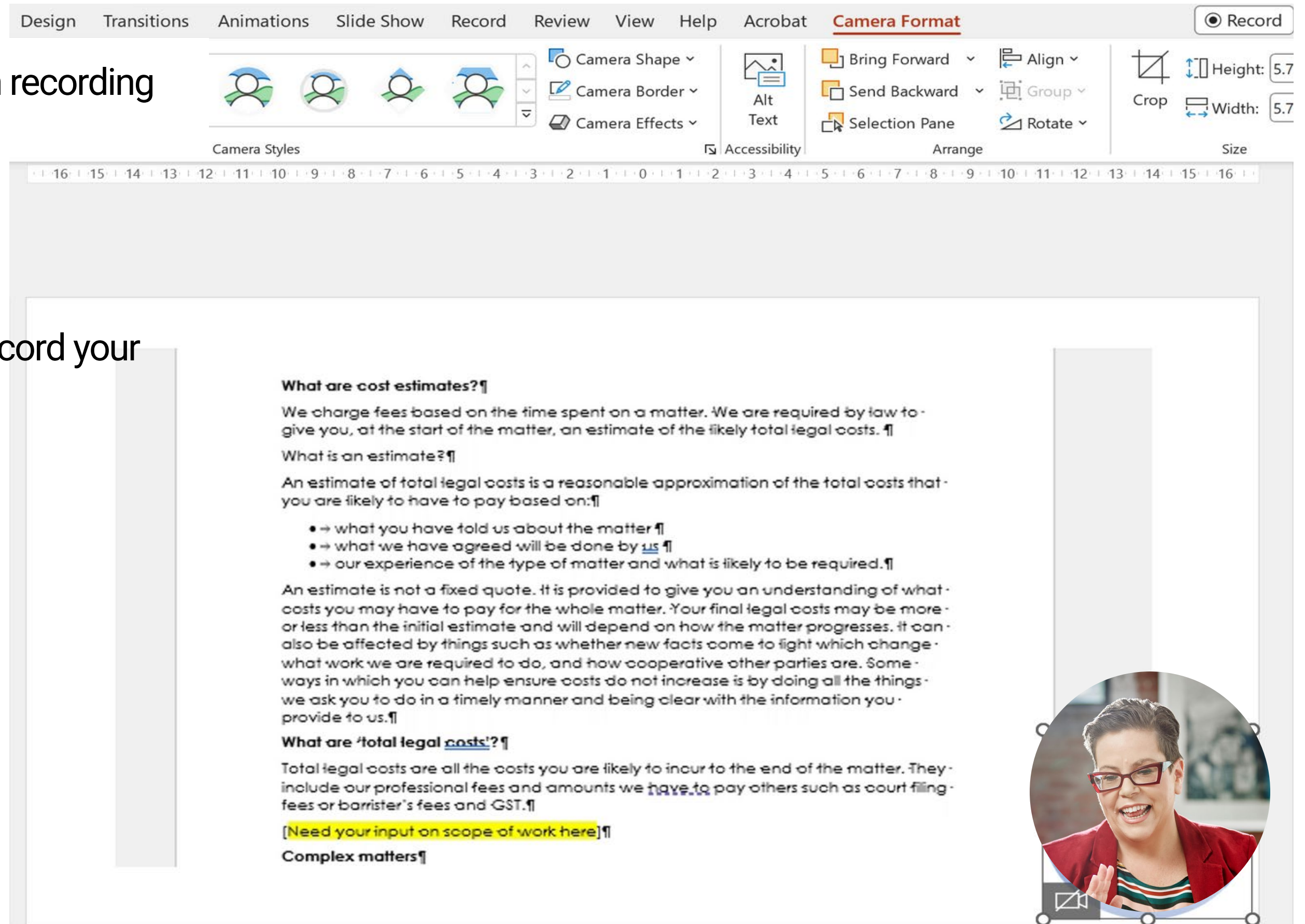
Enter your note here. This box will grow as you enter text.

# Use PowerPoint record to communicate

1 PowerPoint | Record | Screen recording

2 Select area, then Record

3 Select Camera | Cameo to record your face



# Capture all communications on the matter file e.g., SMS, WhatsApp

- more secure if all team use devices supplied by the firm
- digital tools can pull bulk messages into your computer



# Making the most of tech for good systems





# Use templates and checklists: sleep better at night

## MATTER OPENING CHECKLIST

<input type="checkbox"/>	Client contact information <a href="#">entered into practice management</a>
<input type="checkbox"/>	Conflict check clearance
<input type="checkbox"/>	Retainer agreement sent to client on [date]
<input type="checkbox"/>	Signed retainer agreement or written confirmation of retainer
<input type="checkbox"/>	Joint retainer? Written confirmation from each joint client
<input type="checkbox"/>	Estimate provide to client on [date]
<input type="checkbox"/>	Funds received in trust on [date]

### Client intake process

Use this process for a new or existing client enquiry

1.	Introduction
2.	Initial communication
3.	<input type="checkbox"/> Confirm basic details
4.	<input type="checkbox"/> Existing client Y/N? <input type="checkbox"/> Existing client – check contact details correct <input type="checkbox"/> New client – complete client information sheet
5.	Matter description
6.	<input type="checkbox"/> Choose Issue client needs help with [drop down]
7.	<input type="checkbox"/> Additional details
8.	<input type="checkbox"/> Other comments
9.	Pre initial consultation
10.	<input type="checkbox"/> Initial consultation booked
11.	<input type="checkbox"/> Reminder sent for consultation
12.	<input type="checkbox"/> Preparation for initial consultation – save into d <input type="checkbox"/> Checklist for [Matter type]

# Use OneNote for digital checklists

- 1 Default Template created in One Note from LPLC template Checklist or create your own checklist templates

## Will instructions File Note

Sunday, 16 July 2023 12:58 PM

It is a fundamental principle that the instructions must come from the will maker.

Date	Time Start	Time End	Units
------	------------	----------	-------

Matter	Matter No.
--------	------------

Type of meeting (e.g. phone, face to face, video conference)

Location

Author

Attendees

Is this will urgent? No   
 Yes  if Yes state reason(s).

Date in diary to follow up with client to finalise will Click or tap to enter a date.

Verification of Identity Drivers lic.   
 Passport   
 Other  Note type.

Any reason to test client capacity? Yes  Specify reasons  
 No  Specify reasons

Is there a documented family tree? Yes  Copy provided/to be provided by client  
 No  Discuss family tree

Enter your note here. This box will grow as you enter text.

If an independent interpreter was present Insert name of interpreter

Is anyone to be excluded from the will? (eg a child or partner). \*Discussed any possible Part IV of the Administration and probate Act 1958 (Vic) – Family provision claims.

Yes  Note details and client's reasons  
 No

Is this a mirror will with a partner?

Yes  \*Discuss entering into an agreement to not alter the wills after the death of either one.  
 No

Any attorney appointed? (Including enduring and medical)

Yes, copy provided in meeting

Yes, copy to be provide by the client

No  \*Discuss pros and cons of appointing an attorney.

Any prior gifts or loans to beneficiaries to be accounted for in will?

Yes  If yes, details to be provided

# Use Forms for digital checklists

- 1 Checklist created in Forms from LPLC template  
Checklist and access on mobile device



## LPLC Will instructions file note

It is a fundamental principle that the instructions must come from the will maker.

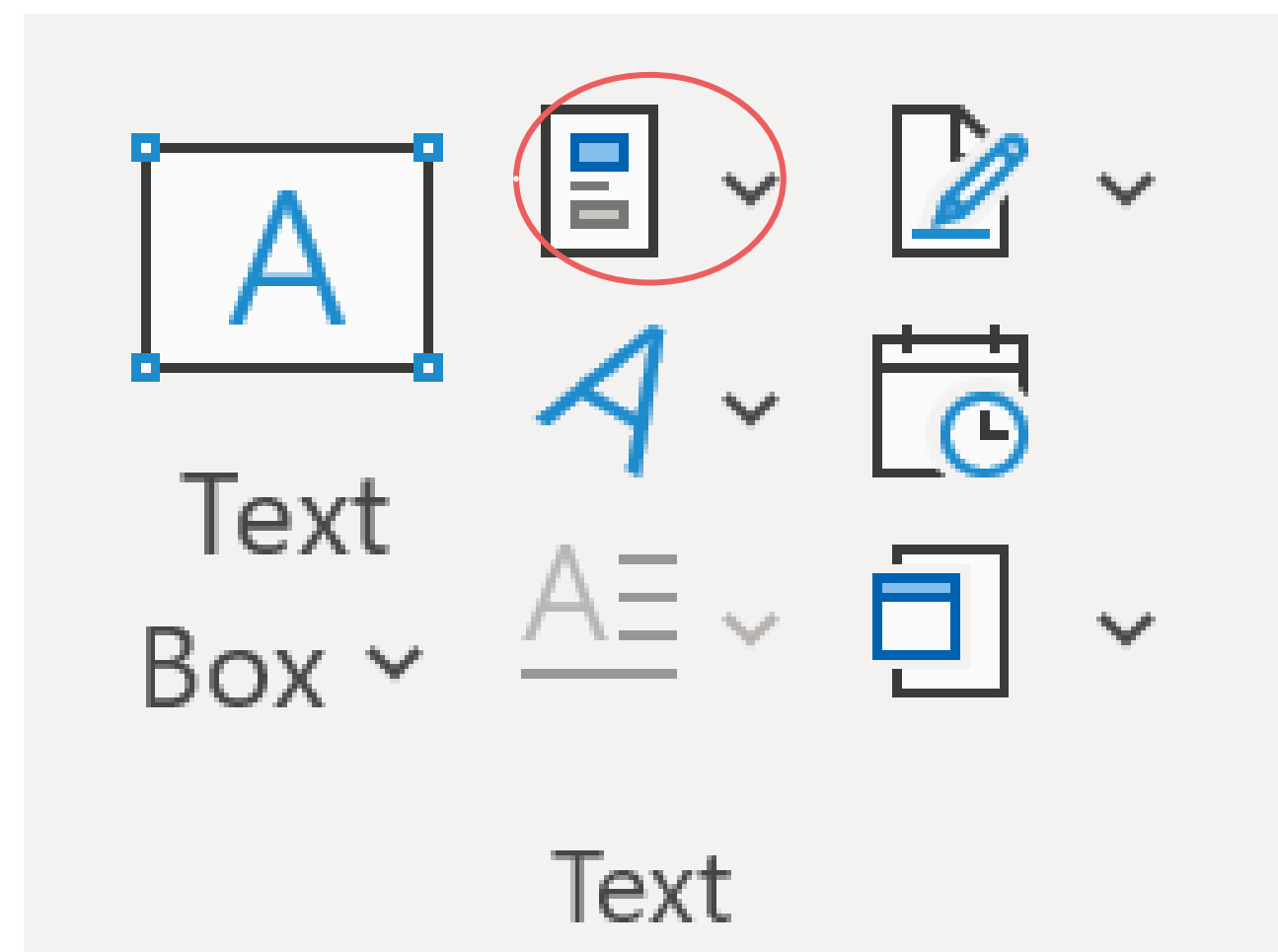
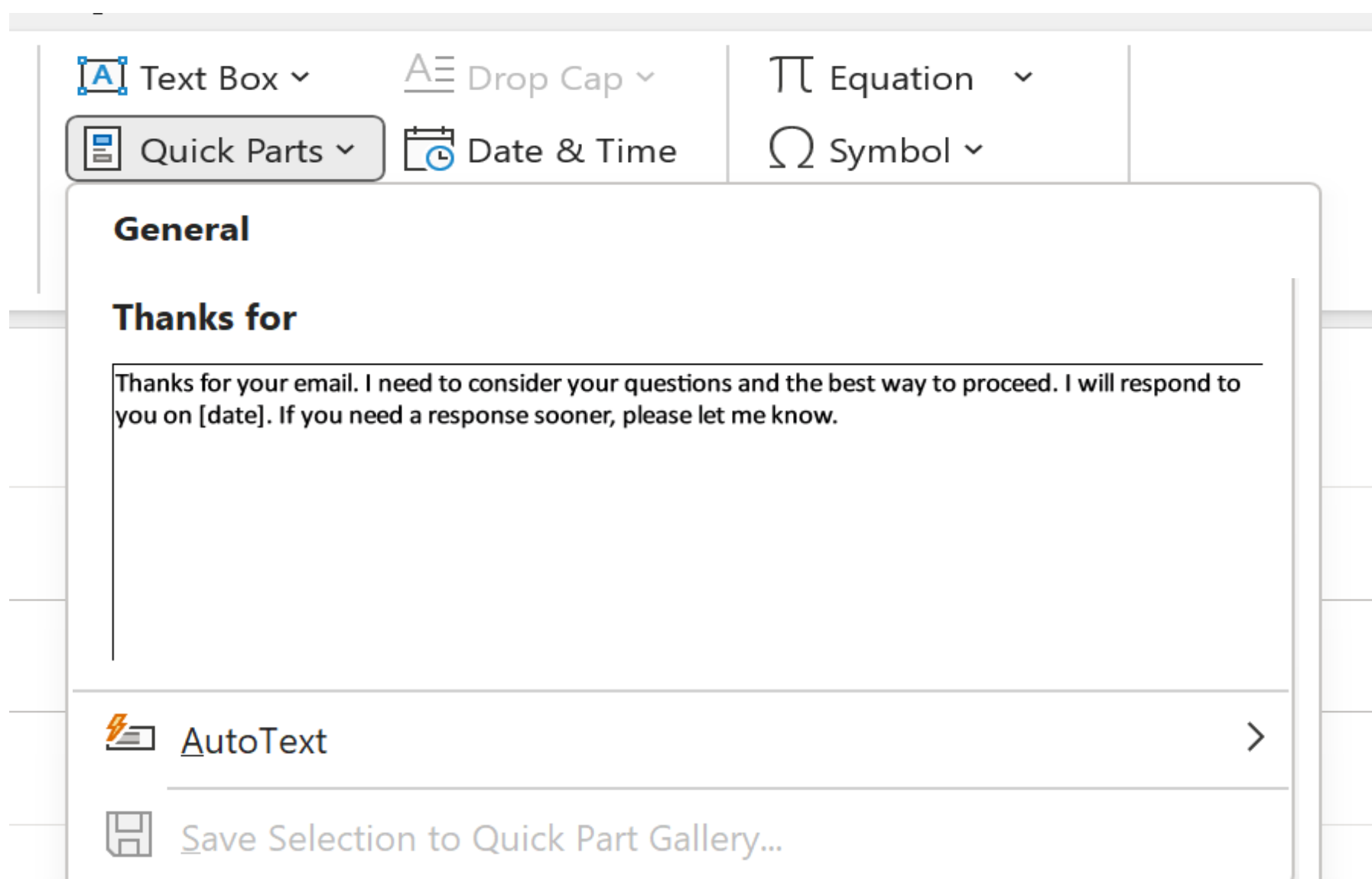
Hi, Fiona. When you submit this form, the owner will see your name and email address.

\* Required

1. Date of instructions \*  
Please input date (M/d/yyyy)
2. Matter and Matter number \*  
Enter your answer
3. Is this will urgent \*  
 Yes  
 No
4. If Yes, state reasons \*  
Enter your answer
5. Date to follow up with client to finalise will \*  
Please input date (M/d/yyyy)
6. Verification of identity \*  
 Drivers Licence

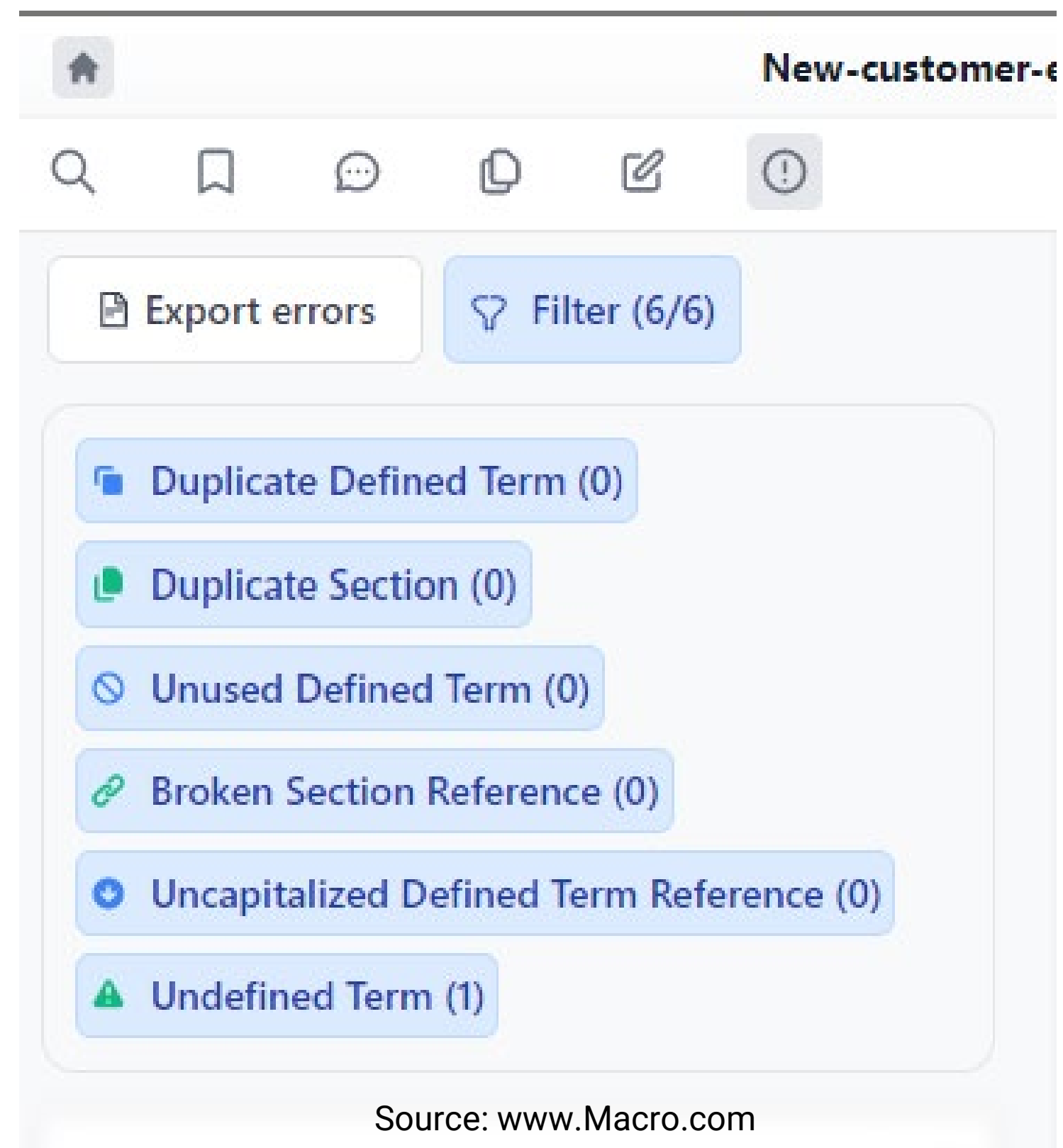
# Built in automation

Quick parts: re-used snippets of text in Word and email



# Document review and proofing

- Build in document review to detect errors like undefined terms, broken cross-references
- Use tools to check for clarity, conciseness, inclusive language and how easy it is to understand

A screenshot of a document review tool interface. The top right corner shows the document title 'New-customer-e'. Below the title is a navigation bar with icons for home, search, bookmark, chat, document, edit, and a warning sign. Below the navigation bar are two buttons: 'Export errors' and 'Filter (6/6)'. The main content area displays a list of error categories, each with a colored icon and a count in parentheses: 'Duplicate Defined Term (0)' (blue icon), 'Duplicate Section (0)' (green icon), 'Unused Defined Term (0)' (blue icon), 'Broken Section Reference (0)' (green icon), 'Uncapitalized Defined Term Reference (0)' (blue icon), and 'Undefined Term (1)' (green icon). At the bottom right of the screenshot, the text 'Source: www.Macro.com' is visible.

New-customer-e

Export errors Filter (6/6)

- Duplicate Defined Term (0)
- Duplicate Section (0)
- Unused Defined Term (0)
- Broken Section Reference (0)
- Uncapitalized Defined Term Reference (0)
- Undefined Term (1)

Source: www.Macro.com

# Version control

- Consolidate multiple versions
- Compare agreements against your template
- Final check of the execution version before signing

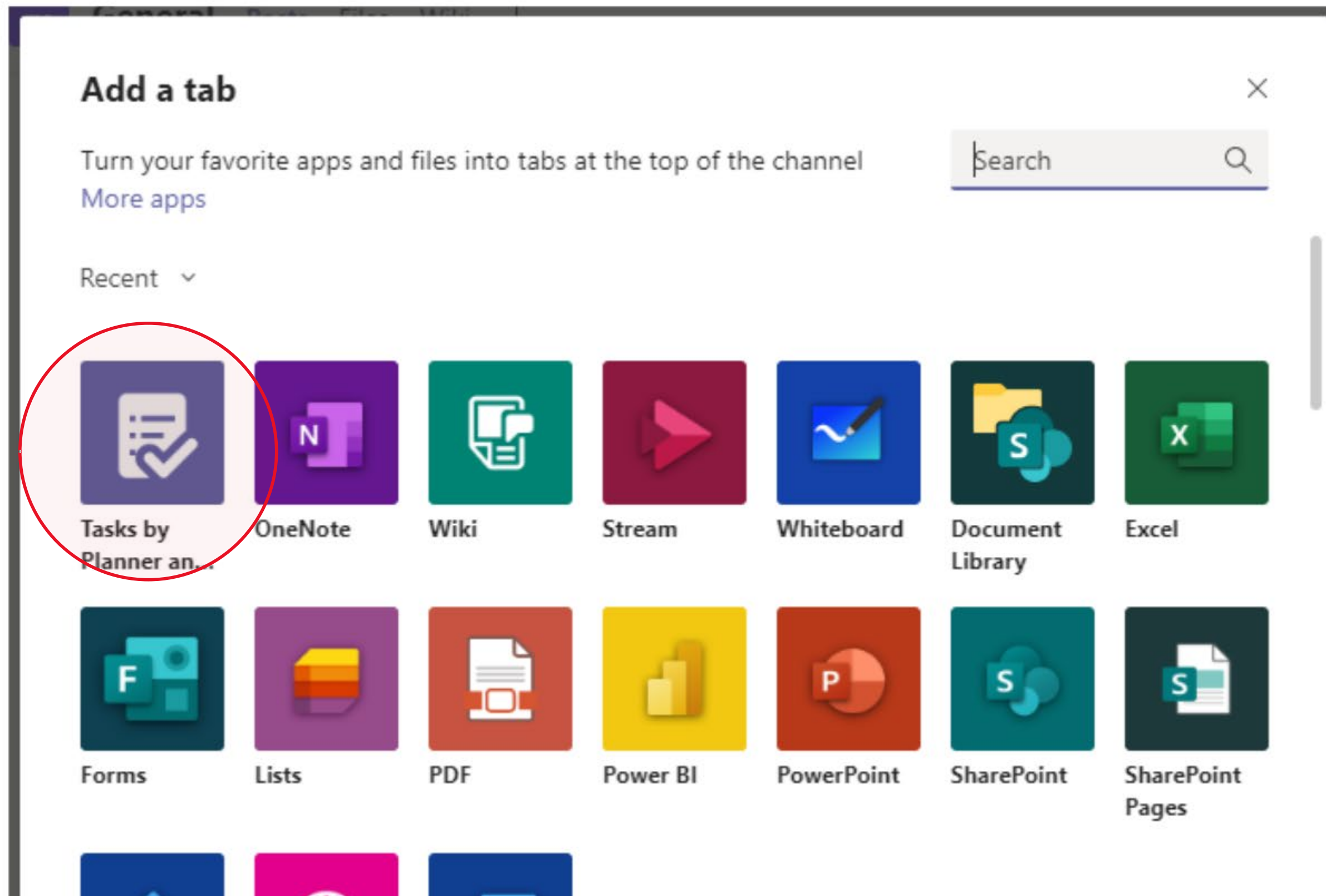


DOCUMENT COMPARE

## End versioning chaos.

Compare files, consolidate edits from multiple Word and PDF files into one version, generate blacklines in bulk, and compare to templates. [See it in action \(2 minutes\)](#)

# Teams: Manage workload in a dispersed team



# Teams: View 1 Kanban board

Template tasks

+ Add task

- Subpoena documents
- Draft subpoena for Production (use Court for
- File subpoena
- Diarise return date
- Letter to subpoenaed party
- Letter to process server
- Service at least X days before return date
- Attend return date
- Check list of documents produced to Court
- Follow up any non production
- Obtain copies of documents produced

0 / 10

Checklist 3 / 10

- Draft subpoena for Production (use Court form xx)
- File subpoena
- Diarise return date
- Letter to subpoenaed party
- Letter to process server

General Posts Files Wiki Litigation team Joint Report +

Group by Bucket Filter List Board Charts Schedule

To do Doing Blocked Done Add new bucket

+ Add task + Add task + Add task + Add task

Mediation position paper Rose 25/05/2021

Discovery Butani review client documents for relevance and pr draft list of documents file list of documents 1 / 4 03/06/2021

Draft statement Twyla Sands

Defence Roland Schitt 18/05/2021

pre mediation conference Johnny Rose 17/05/2021

new task 3 hours 27/04/2022

draft motion Currie 13/05/2021

Rose: updated advice 17/05/2021

Budd particulars request 13/05/2021

Rose Brief counsel

Rose review new subpoenaed records

Completed tasks 1



# Teams: View 2 task list

General					Posts	Files	Wiki	Litigation team	Joint Report	1 more	+	Meet
All Active					Filter	List	Board	Charts	Schedule			
Task title	Assigned to	Priority	Due	Bucket	↓							
+ Add a task												
○ test				To do								
○ Mediation position paper Rose			05/2021	To do								
○ Insurance renewal			05/2021	To do								
○ Discovery Butani	1/4	FM Fiona McLay	06/2021	To do								
○ Draft statement Twyla Sands				To do								
○ Defence Roland Schitt			05/2021	To do								
○ pre mediation conference Johnny Rose			05/2021	To do								
○ new task 3 hours		FM Fiona McLay	27/04	Doing								
○ draft motion Currie			05/2021	Doing								
○ Rose: updated advice			05/2021	Doing								
○ Budd particulars request			05/2021	Doing								
○ Rose Brief counsel				Blocked								
○ Rose review new subpoenaed records				Done								

# Teams View 3: Schedule

Group by Bucket Filter List Board Charts **Schedule**

< > May 2021 Hide future recurring tasks  Week **Month**

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
26	27	28	29	30	1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
			<div style="background-color: #c00000; color: white; padding: 2px;">Budd particulars r...</div> <div style="background-color: #c00000; color: white; padding: 2px;">draft motion Currie</div>	<div style="background-color: #c00000; color: white; padding: 2px;">Rose: updated advice</div>			
17	18	19	20	21	22	23	
<div style="background-color: #c00000; color: white; padding: 2px;">Rose: updated adv...</div> <div style="background-color: #c00000; color: white; padding: 2px;">pre mediation con...</div>	<div style="background-color: #c00000; color: white; padding: 2px;">Defence Roland S...</div>						
24	25	26	27	28	29	30	
	<div style="background-color: #c00000; color: white; padding: 2px;">Mediation positio...</div>						
31	1	2	3	4	5	6	
			<div style="background-color: #c00000; color: white; padding: 2px;">Discovery Butani</div>				

**Unscheduled tasks**

+ Add task

**To do** ^

Draft statement Twyla Sands

**Doing** ^

**Blocked** ^

Rose Brief counsel

**Done** ^

Rose review new subpoenaed records

**Completed** v

# Use Teams Planner app for automated reminders

Hi Fiona. You have a task due.



You have an **upcoming** task

**test**

In the plan Tasks linked to  Tech enabled law firm project > General

 1/26/2023 Due in 1 day

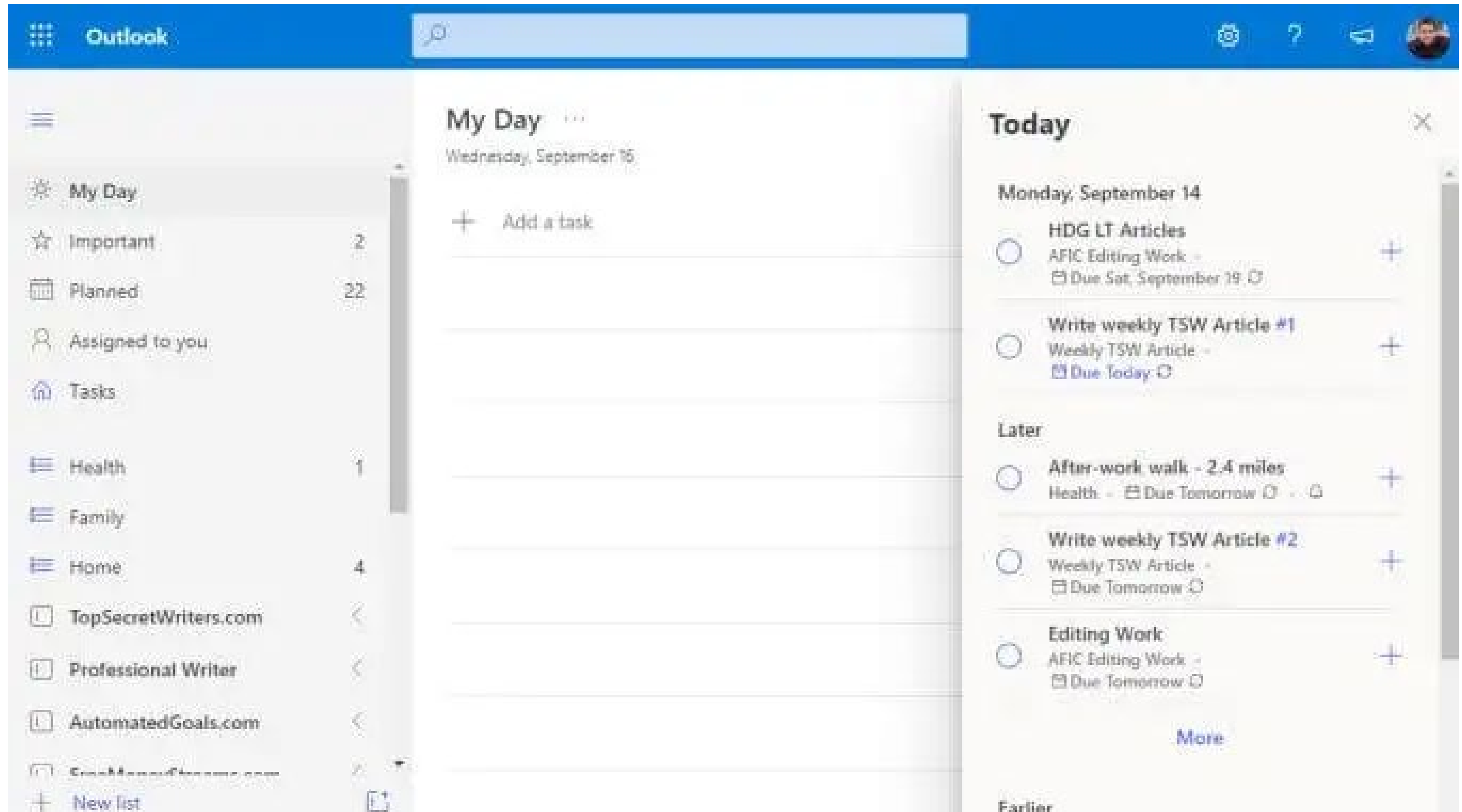
View tasks in  Microsoft To Do or  Microsoft Planner

To change your notification settings, go to [Planner for web](#), choose the settings button in the top right, and then select Notifications. [Learn more.](#)

You are receiving this email because you have subscribed to Microsoft Office 365.

[Privacy Statement.](#)

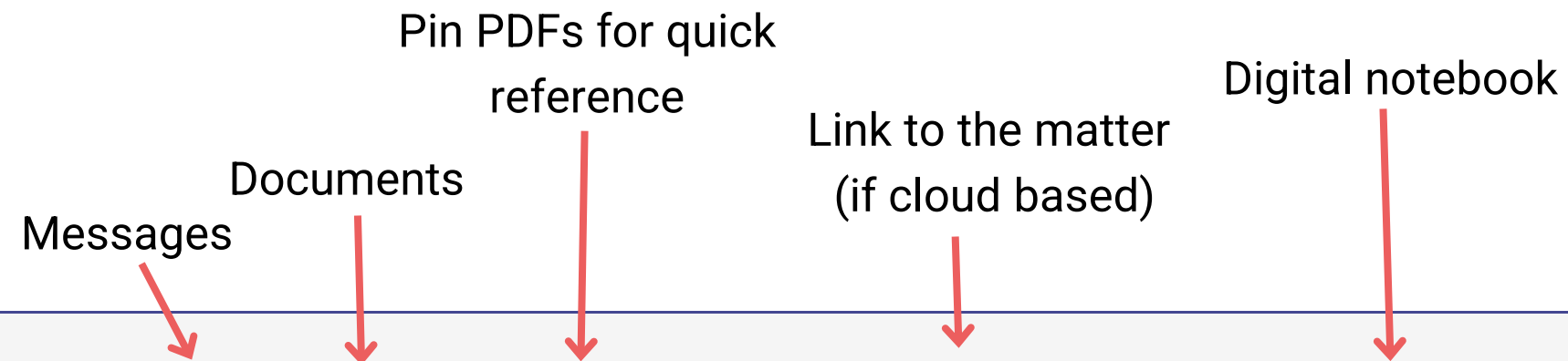
# Use ToDo for your work, personal, project tasks



The screenshot displays the Microsoft Outlook ToDo application interface. The top navigation bar is blue and contains the Outlook logo, a search bar, and utility icons for settings, help, and a user profile picture. The main interface is divided into three vertical panes:

- Left Pane (Navigation):** A list of task lists and categories. The 'My Day' list is selected and highlighted. Other lists include 'Important' (2 items), 'Planned' (22 items), 'Assigned to you', 'Tasks', 'Health' (1 item), 'Family', 'Home' (4 items), 'TopSecretWriters.com', 'Professional Writer', 'AutomatedGoals.com', and 'Ebook4meofthecrow.com'. A 'New list' button is at the bottom.
- Center Pane (My Day):** Titled 'My Day' for 'Wednesday, September 15'. It features a '+ Add a task' button and a series of horizontal lines representing task slots.
- Right Pane (Today):** Titled 'Today' for 'Monday, September 14'. It shows a list of tasks with due dates and expandable options:
  - HDG LT Articles:** AFIC Editing Work - Due Sat, September 19.
  - Write weekly TSW Article #1:** Weekly TSW Article - Due Today.
  - Later:**
    - After-work walk - 2.4 miles:** Health - Due Tomorrow.
    - Write weekly TSW Article #2:** Weekly TSW Article - Due Tomorrow.
    - Editing Work:** AFIC Editing Work - Due Tomorrow.A 'More' link is visible at the bottom of the list.

# Use Teams for an online Matter hub



Te **Donoghue v Stevenson** Posts Files Court timetable Matter file (LPMS) Tech enabled law firm... ▾ +

File Home Insert Draw View Help Tell me what you want to do Open in Browser ▾

↶ ▾ 📄 ▾ Calibri Light ▾ 20 ▾ **B** *I* U 🖋 ▾ A ▾ 📌 A ▾ ... | ☰ ▾ ☰ ▾ ☰ ▾ | 🎨 Styles ▾ | 📌 Tags ▾

📖 Tech enabled law firm project Notebook

- 🔍 Witness contact details
- 📄 Conference transcripts
- 📅 Chronology
- 📄 Key documents

Witness contact details

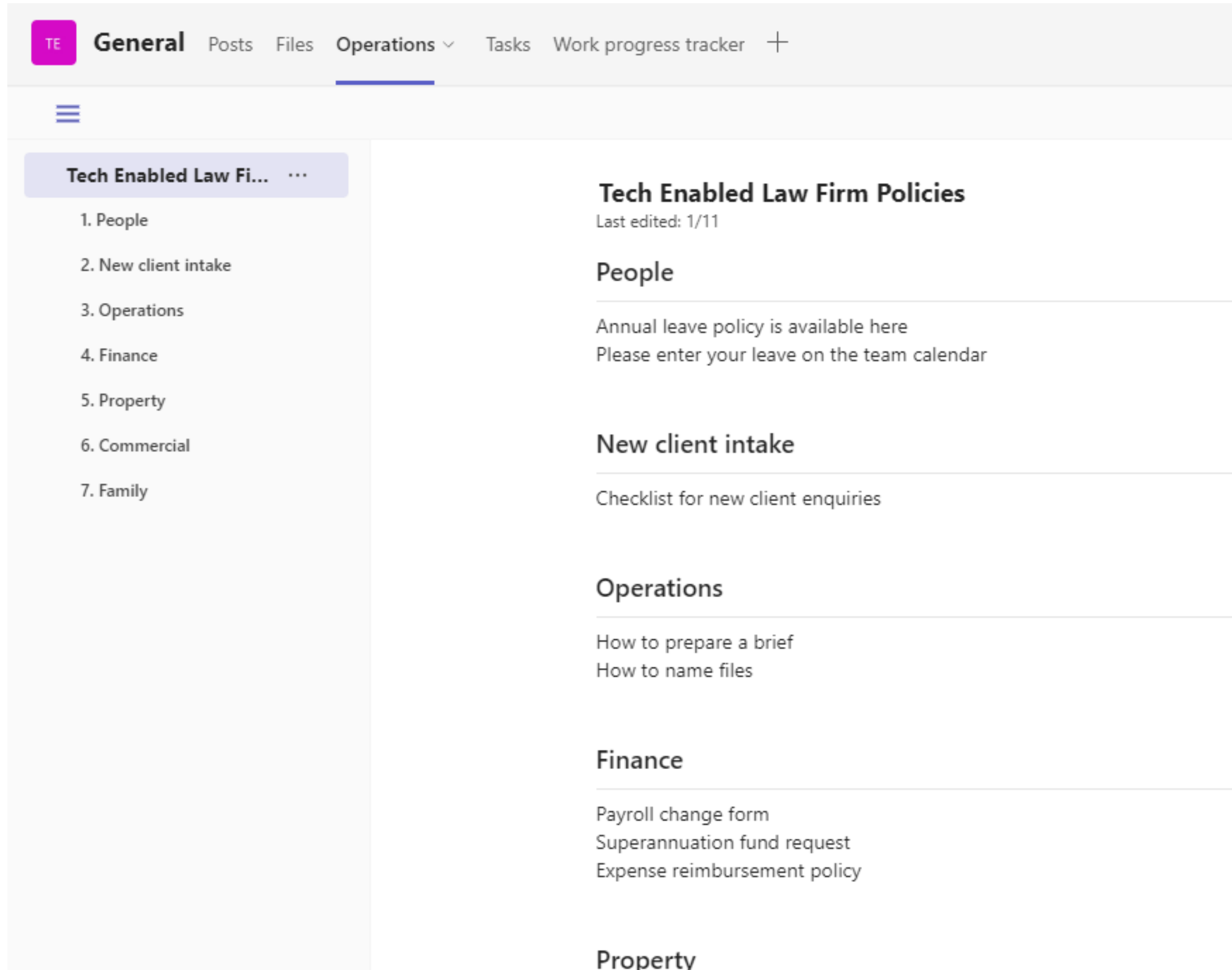
Dramatis personae

**Subpoena list**

28 February 2023 21:44

Witness name	Subpoena filed	Served	Conduct money

# Use Teams to access policies and procedures



The screenshot shows a Microsoft Teams channel interface. At the top, there is a navigation bar with a purple 'TE' icon, the channel name 'General', and tabs for 'Posts', 'Files', 'Operations' (which is selected), 'Tasks', and 'Work progress tracker'. Below the navigation bar is a hamburger menu icon. On the left side, there is a sidebar with a list of categories: 'Tech Enabled Law Fi...' (highlighted), '1. People', '2. New client intake', '3. Operations', '4. Finance', '5. Property', '6. Commercial', and '7. Family'. The main content area on the right displays the 'Tech Enabled Law Firm Policies' page, which includes a subtitle 'Last edited: 1/11' and several sections: 'People' (with text about annual leave policy), 'New client intake' (with a checklist for new client enquiries), 'Operations' (with links to 'How to prepare a brief' and 'How to name files'), 'Finance' (with links to 'Payroll change form', 'Superannuation fund request', and 'Expense reimbursement policy'), and 'Property'.

**TE** **General** Posts Files **Operations** Tasks Work progress tracker +

☰

**Tech Enabled Law Fi...** ...

1. People
2. New client intake
3. Operations
4. Finance
5. Property
6. Commercial
7. Family

## Tech Enabled Law Firm Policies

Last edited: 1/11

### People

---

Annual leave policy is available here  
Please enter your leave on the team calendar

### New client intake

---

Checklist for new client enquiries

### Operations

---

How to prepare a brief  
How to name files

### Finance

---

Payroll change form  
Superannuation fund request  
Expense reimbursement policy

### Property

# Making the most of tech for keeping up to date



# Use Lists for an index that can be searched, filtered and sorted

Microsoft Lists

Search this list

+ New Edit in grid view Share Export Automate Integrate

All Items\* Info

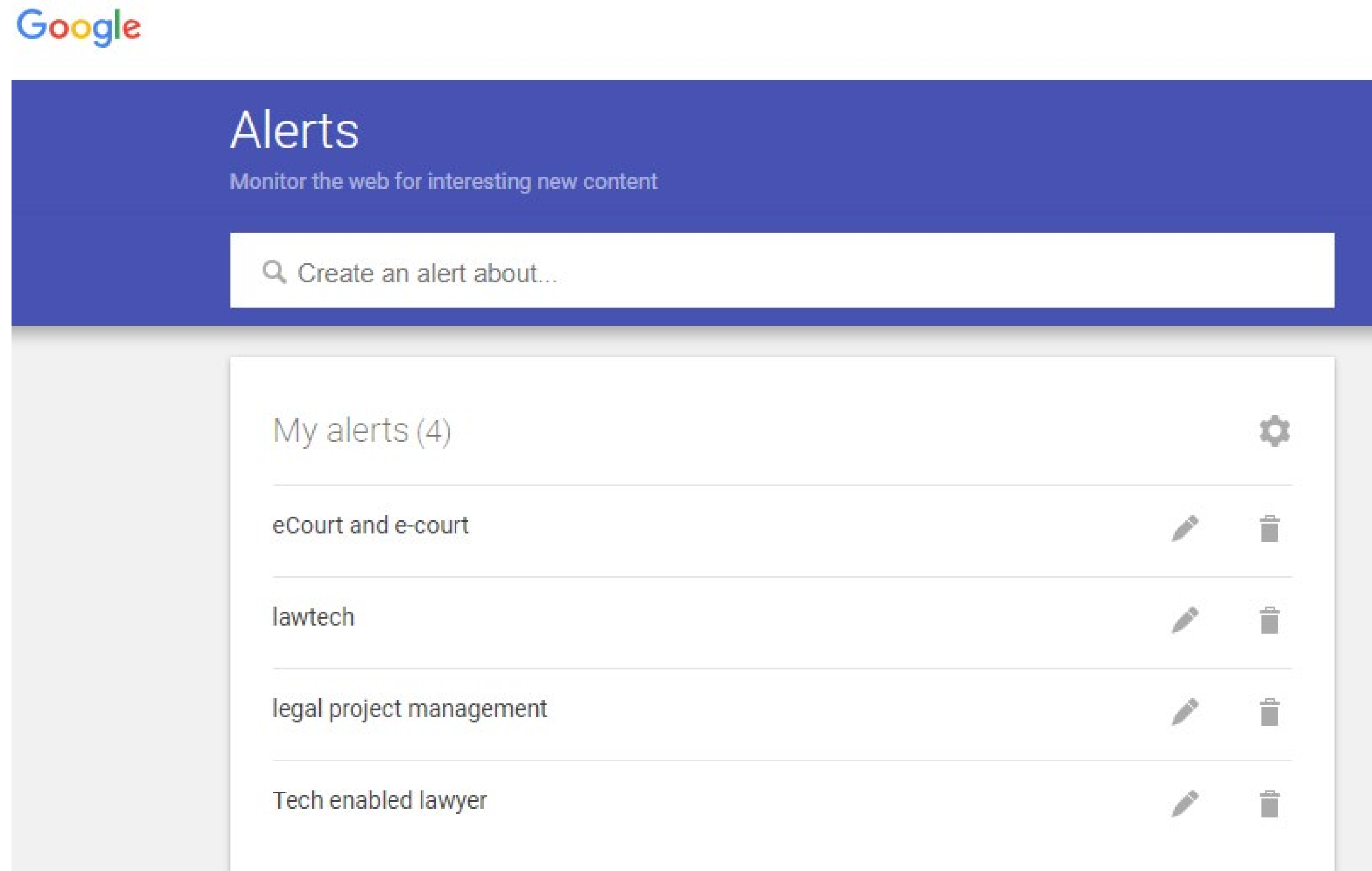
My lists

Example of case list

Title	Citation	Judge	Court	Date	Summary	Comments	Late amendment
Johnson v. Smith	[2023] VSC 123	Justice Adams	Supreme Court of Victoria	January 09	The court allowed the plaintiff to amend their pleadings to include additional causes of action.	The judge emphasized the need for the amendment to be necessary for the just determination of the case and not unduly prejudicial to the other party.	Allowed
Green v. Davis	[2022] VSCA 456	Justice Parker	Victorian Court of Appeal	June 04, 2022	The appellate court upheld the trial court's decision to refuse the late amendment of the plaintiff's pleadings.	The court found that the plaintiff's application for amendment lacked merit as it was an attempt to introduce a new theory of liability at a very late stage of the proceedings, causing significant prejudice to the defendant.	Appeal
Wilson Manufacturing Pty Ltd v. Brown	[2021] VCC 789	Magistrate Jones	Victorian Civil and Administrative Tribunal	September 19, 2021	The tribunal allowed the late amendment of the respondent's pleadings.	The tribunal considered factors such as the explanation for the delay, the potential prejudice to the other party, and the impact on the efficient conduct of the proceedings before granting the amendment.	Allowed
Rogers v. Thompson	[2023] VSC 456	Chief Justice Roberts	Supreme Court of Victoria	March 29	The court denied the plaintiff's application to amend their pleadings to add a new defendant.	The court ruled that the proposed amendment was not essential to the resolution of the dispute and would cause undue delay and prejudice to the existing parties.	Not allowed
White v. Black	[2022] VSCA 789	Justice Williams	Victorian Court of Appeal	August 14, 2022	The court allowed the defendant to amend their pleadings to raise an additional defense.	The court considered that the proposed amendment was based on new evidence discovered after the original pleadings were filed, and allowing the amendment would not unduly affect the progress of the case.	Allowed
XYZ Corporation v. Johnson	[2021] VSC 234	Justice Lee	Supreme Court of Victoria	February 02, 2021	The court granted leave for both parties to amend their respective pleadings.	The judge noted that the amendments were sought well before the trial date, and allowing them would promote a fair and efficient resolution of the dispute.	Allowed
Wallace v. Hardy	[2023] VSCA 987	Justice Moore	Victorian Court of Appeal	November 11	The court refused the plaintiff's application for late amendment of pleadings.	The court found that the plaintiff had ample opportunity to plead the additional claims in the original statement of claim and failed to provide reasonable justification for the delay in seeking the amendment.	Not allowed
Baker v. Lee	[2022] VSC 345	Justice Adams	Supreme Court of Victoria	July 24, 2022	The court allowed the plaintiff to amend their pleadings to correct typographical errors.	The court considered that the amendments sought were minor in nature and would not prejudice the defendant's ability to respond effectively.	Allowed
Young Manufacturing Pty Ltd v. Foster	[2021] VCCA 567	Justice Scott	Victorian Civil and Administrative Tribunal	April 07, 2021	The appellate court upheld the tribunal's decision to allow the late amendment of the respondent's pleadings.	The court found that the tribunal correctly exercised its discretion in granting the amendment, as it was necessary for the fair resolution of the matter and the respondent had provided a reasonable explanation for the delay.	Appeal



# Use Google Alerts to track key developments or clients

A screenshot of the Google Alerts website. At the top left is the Google logo. Below it is a blue header with the word 'Alerts' in white and the subtitle 'Monitor the web for interesting new content'. A search bar with a magnifying glass icon contains the text 'Create an alert about...'. Below the search bar is a white box titled 'My alerts (4)' with a gear icon for settings. It lists four alerts: 'eCourt and e-court', 'lawtech', 'legal project management', and 'Tech enabled lawyer'. Each alert has a pencil icon for editing and a trash can icon for deleting.

Google

## Alerts

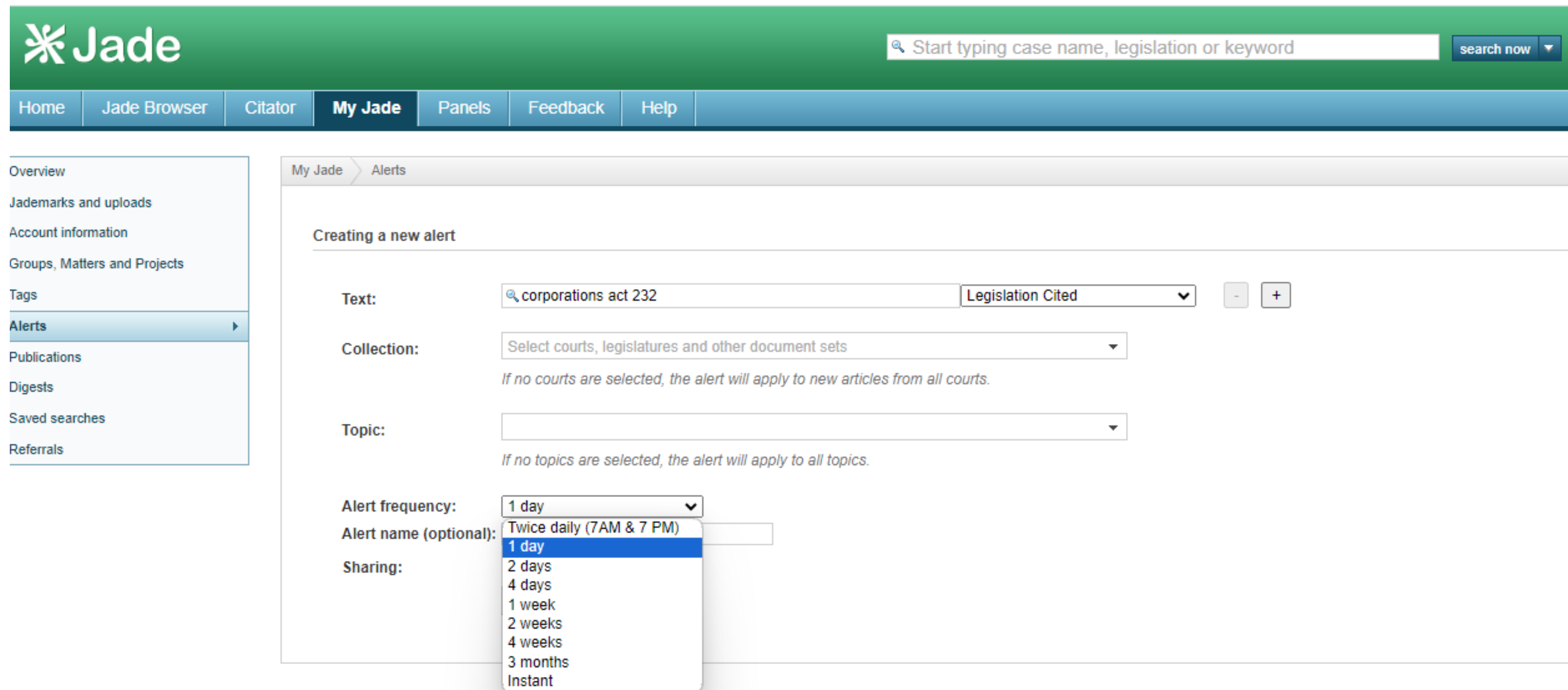
Monitor the web for interesting new content

🔍 Create an alert about...

My alerts (4) ⚙️

- eCourt and e-court ✎️ 🗑️
- lawtech ✎️ 🗑️
- legal project management ✎️ 🗑️
- Tech enabled lawyer ✎️ 🗑️

# Use Jade to create alerts for any changes to key legislation for your practice area



The screenshot shows the Jade web application interface. At the top, there is a green header with the Jade logo and a search bar containing the text "Start typing case name, legislation or keyword" and a "search now" button. Below the header is a blue navigation bar with links for Home, Jade Browser, Citator, My Jade, Panels, Feedback, and Help. On the left side, there is a sidebar menu with options: Overview, Jademarks and uploads, Account information, Groups, Matters and Projects, Tags, Alerts (highlighted), Publications, Digests, Saved searches, and Referrals. The main content area is titled "My Jade Alerts" and "Creating a new alert". It contains several form fields: "Text" with the value "corporations act 232" and a dropdown menu set to "Legislation Cited"; "Collection" with a dropdown menu set to "Select courts, legislatures and other document sets" and a note below it: "If no courts are selected, the alert will apply to new articles from all courts."; "Topic" with a dropdown menu and a note below it: "If no topics are selected, the alert will apply to all topics."; "Alert frequency" with a dropdown menu set to "1 day"; "Alert name (optional)" with a text input field containing "Twice daily (7AM & 7 PM)"; and "Sharing" with a dropdown menu. The "Alert frequency" dropdown menu is open, showing options: 1 day, 2 days, 4 days, 1 week, 2 weeks, 4 weeks, 3 months, and Instant.

# Use Jade to create Jademarks for relevant paragraphs of cases as you read and tag them by topic/issue

The screenshot displays the Jade web application interface. At the top, there is a search bar with the text "Start typing case name, legislation or keyword" and a "search now" button. Below the search bar is a navigation menu with options: Home, Jade Browser, Citator, My Jade, Panels, Feedback, and Help.

The main content area is divided into several sections:

- Left Sidebar (Case Trace):** Shows details for a case, including "Citations: [2017] NSWSC 175 [Copy]", "Cases cited: 9", "Statutory material cited: 2", and "Cited sections: [59], [64]". It also includes a "Most recent citation" and a "Source" link to "Download original document".
- Left Sidebar (Navigation):** A vertical menu with options like "Overview", "Jademarks and uploads", "Account information", "Groups, Matters and Projects", "Tags", "Alerts", "Publications", "Digests", "Saved searches", and "Referrals". The "Tags" option is highlighted.
- Case Annotations:** Two case entries are shown:
  - TNG (06.03.2017 - [Public]):** Has one tag: "Oppression".
  - FM6 (18.06.2017 - [Selection]):** Has one tag: "minority shareholder".
- Right Panel (Manage my tags):** A list of tags organized alphabetically from A to S. The tag "minority shareholder" is highlighted in blue, and a large grey arrow points from this tag in the list to the tag on the FM6 case annotation.

# Use Jade Citation Report to get an alert when legislation is cited or changed

*Article source: Victorian Legislation - Acts*

Mental Health and Wellbeing Act 2022 (Vic)

## Citation report

**Full report:** [View this article in the Jade Citator](#)

**Citations:** [Mental Health and Wellbeing Act 2022 \(Vic\)](#) [Add a citation](#)

**Export and alerts:** [Print/Export](#) · [Alert: when this document is cited](#) · [Alert: when this statute changes](#)

**Visualisations:** [Similarity](#) · [HotSpot](#) · [More](#) ?

**Jump to:** [Cases cited](#) · [Legislation cited](#) · [Incoming links](#) · [Legislation versions](#) · [Top](#)

**Citation counts:**


**Show:** All citations ▼

**Cases and legislation citing this provision**

Name	Court	Date	Citations
<a href="#">Health Legislation Amendment (Information Sharing) Act 2023 (Vic)</a>	Victorian Legislation - Acts	2023	2 citations
<a href="#">Sex Offenders Registration Amendment Regulations 2023 (Vic)</a>	Victorian Legislation - Statutory Instruments	2023	2 citations

**Legislation cited by this provision**

Name	Citations
<a href="#">Ambulance Services Act 1986 (Vic)</a>	7 citations: Section 3(1)
<a href="#">Audit Act 1994 (Vic)</a>	1 citation: Section 40
<a href="#">Carers Recognition Act 2012 (Vic)</a>	1 citation: Section 3
<a href="#">Charter of Human Rights and Responsibilities Act 2006 (Vic)</a>	2 citations
<a href="#">Child Wellbeing and Safety Act 2005 (Vic)</a>	5 citations: Schedule 1, 3, Section 16Y(c)(ii), 41A(1)(c)(ii), 41H(1)(g)

Alert: when this document is cited · Alert: when this statute changes

# Making the most of tech for **Key dates**



# Use Lists to track progress and fixed fee stages

Microsoft Lists

[+ New](#)
[Edit in grid view](#)
[Share](#)
[Export](#)
[Automate](#)
[Integrate](#)
[Open in SharePoint](#)

Tech enabled law firm project  
**Progress tracker list** ☆ ☑

Work item	Description	Category	Progress	Priority	Start date	Due date	Notes
Chen Property Stage 1 \$5K	Stage 2: negotiation	Property	In progress		July 09	5 days from now	Requested funds letter 1 July 3/7 F/up phone
Johnson Parenting Stage 5 30K	Stage 5 Hearing 19 November	Family	Not started	Low	October 29	November 19	Counsel briefed
Singh Estate Planning Stage 3	Stage 3 Execution	Estates	Behind	High	June 25	July 06	Phoned LM

# Use Lists app to automate reminders

## Set a reminder ✕

Get an email reminder

Flow type: Scheduled

Remind me a number of days in advance of the date in the column

**Flow name**

**Remind me this many days in advance \***

# Making the most of tech

using Chat GPT and other generative AI





# Do try out ChatGPT

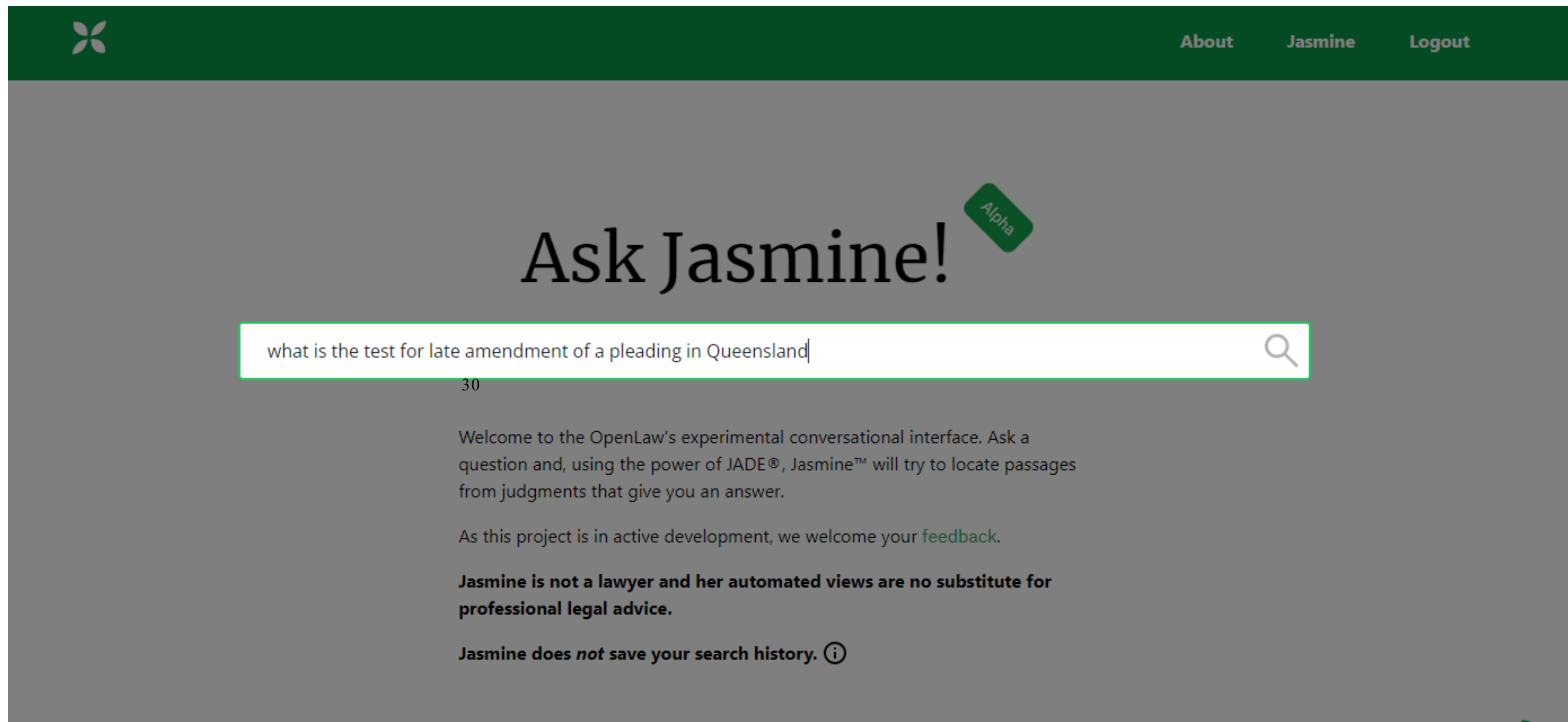
- Chat GPT-3 - Consumer version – not suitable for client confidential information

Is good at:

- create clear and concise explanations of complex topics
- provide different perspectives
- synthesize information
- inspiration for creative ideas
- draft step by step instructions on how to perform common tasks on software

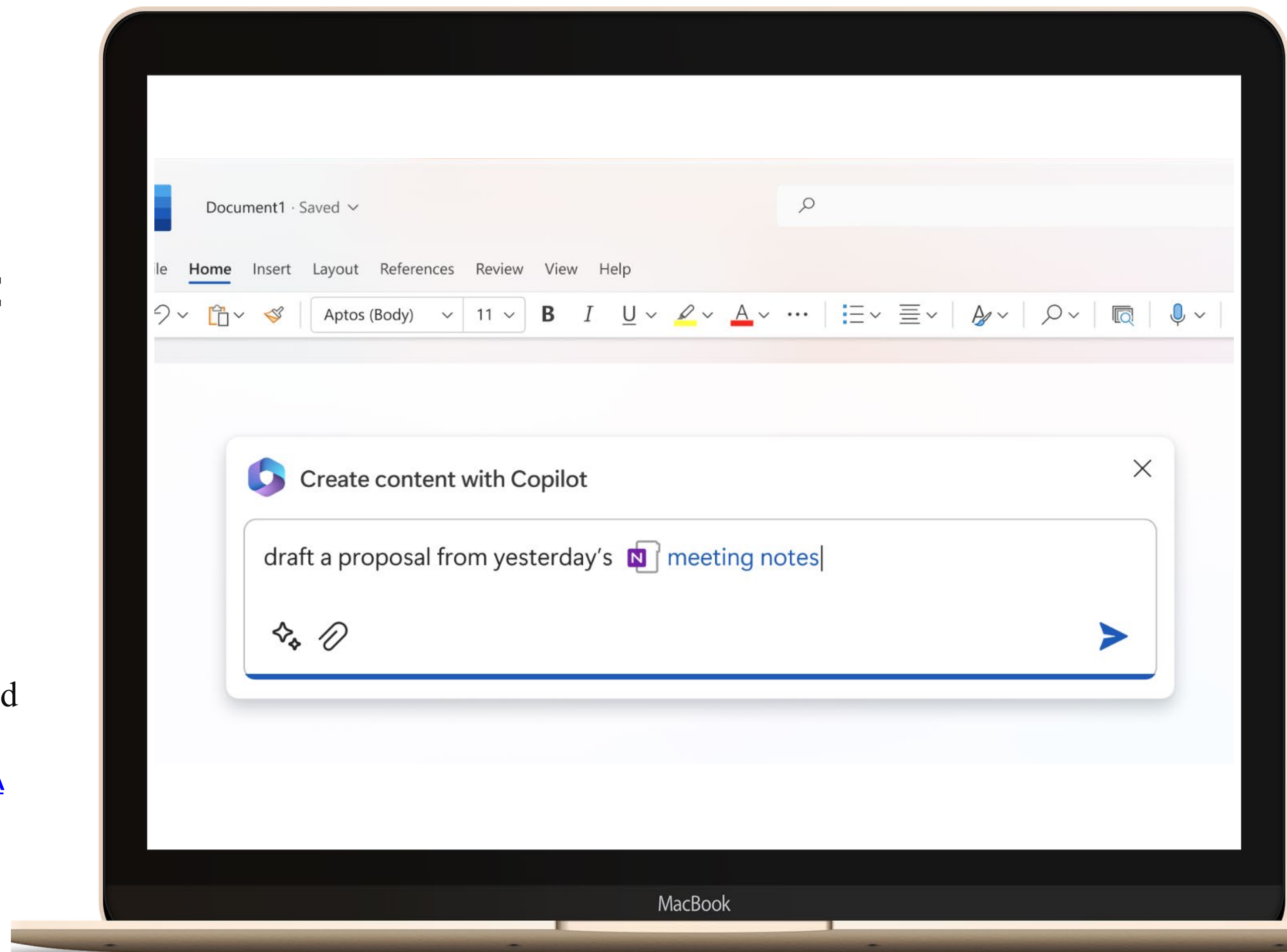


Use [jasmine.jade.io](https://jasmine.jade.io) for natural language research

A screenshot of the "Ask Jasmine!" web interface. The page has a dark green header with a logo on the left and navigation links "About", "Jasmine", and "Logout" on the right. The main content area is grey and features the text "Ask Jasmine!" in a large serif font, with a small green "Alpha" badge to its right. Below this is a search input field with a green border containing the text "what is the test for late amendment of a pleading in Queensland" and a magnifying glass icon. Underneath the search bar, the number "30" is displayed. The main text reads: "Welcome to the OpenLaw's experimental conversational interface. Ask a question and, using the power of JADE®, Jasmine™ will try to locate passages from judgments that give you an answer. As this project is in active development, we welcome your [feedback](#)." Below this is a bolded disclaimer: "Jasmine is not a lawyer and her automated views are no substitute for professional legal advice." At the bottom, it states: "Jasmine does *not* save your search history." followed by an information icon (i).

# Coming soon Microsoft Copilot

Microsoft 365 Copilot:  
Your Questions Answered  
Lisa Crosbie  
<https://youtu.be/tQcf-rNX2EA>



# LPLC Cyber security guide

Cyber security | Last updated on 24 March 2021

## Cyber Security Guide for Lawyers

LPLC has produced a guide full of practical information to help lawyers be cybersafe. The guide outlines **5 key areas** of focus and explains why each is important to be included in cybersafe strategies for law practices. For each key area the guide provides a checklist of practical steps to take to secure any legal practice.

### What's on this page?

- ↓ 1. Secure your technology
- ↓ 2. Establish policies and procedures
- ↓ 3. Create a culture of cyber risk awareness
- ↓ 4. Warn clients about cyber risks
- ↓ 5. Have an incident response plan for prompt action
- ↓ Download a pdf of the complete guide
- ↓ Useful websites and resources

### Find resources in

Property

### Practice Management

Commercial

Family Law


Personal & Succession law

Securities

Litigation

Wellbeing & Mental Health

Print

Share this resource 









**The best tool is the  
one you will use**



**Identify the one  
thing you will do  
as a next step**

---

**1**



**Enable you  
or your  
team to  
work more  
effectively**



**Improve the  
way you  
communicate  
with clients  
or potential  
clients**



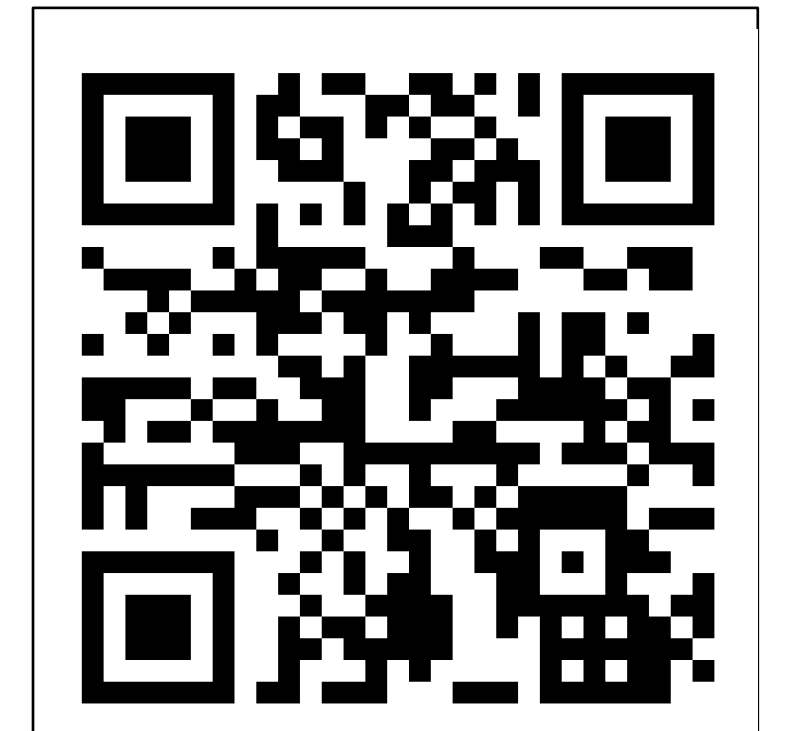
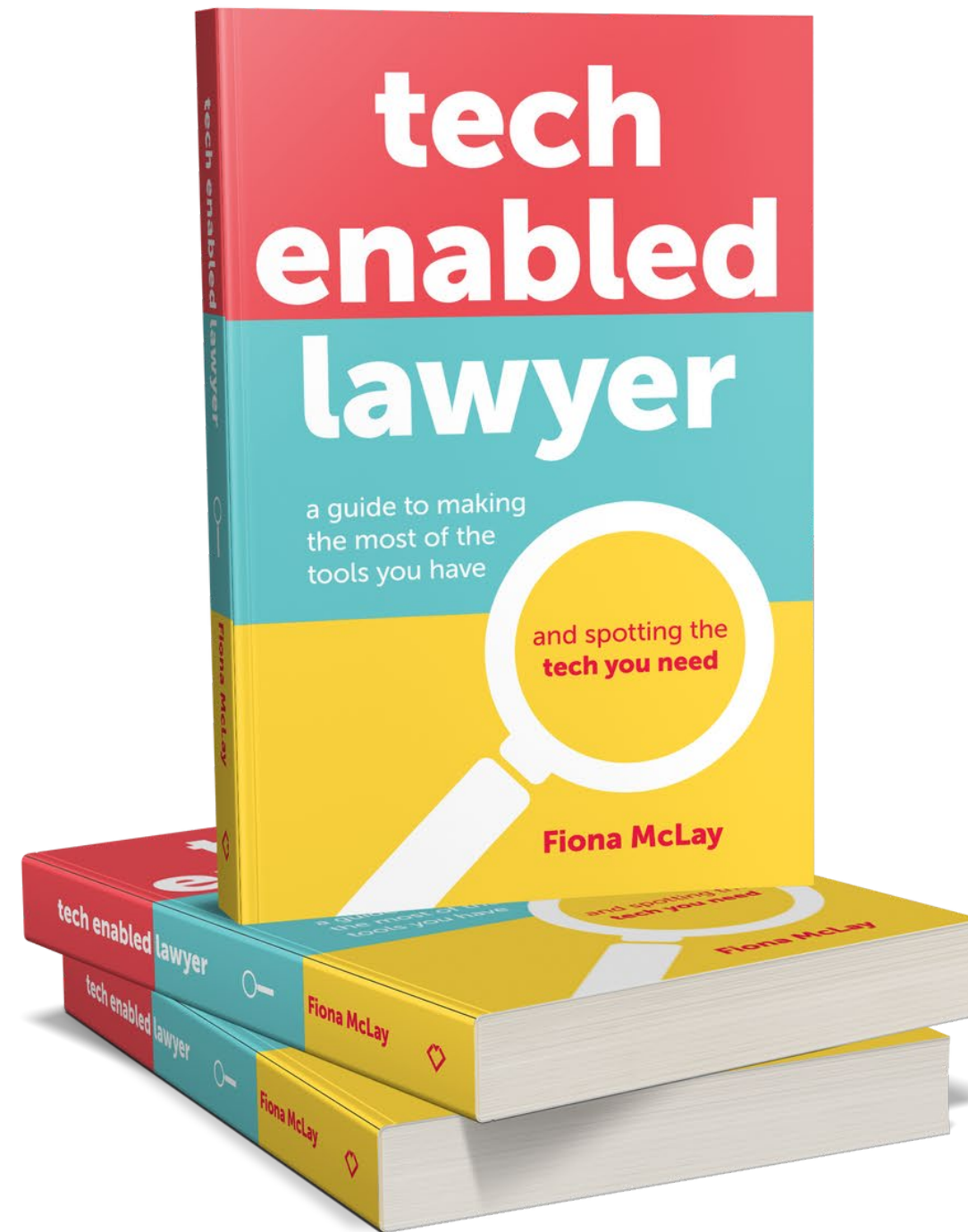
**Eliminate an  
annoying or  
repetitive  
manual task  
that is an  
unrecoverable  
cost**

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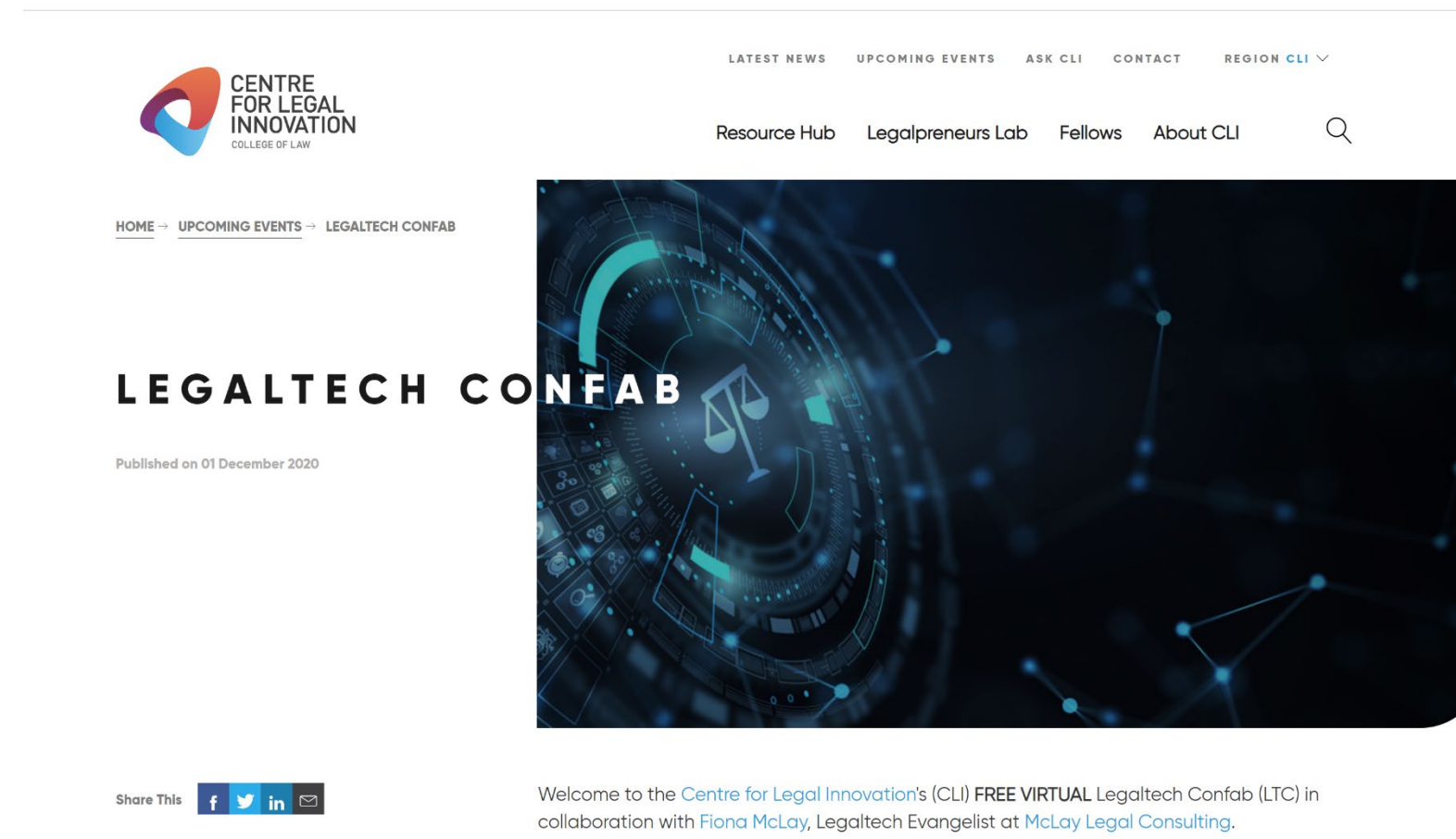


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