ASSOCIATION OF CORPORATE COUNSEL

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David Munn, Former In-house Attorney for Fair Issac

MODERATOR: **David Simon,** President, WeComply

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Operator: Just a reminder, today's conference is being recorded.

Female: Welcome to this ACC webcast. David? Please go ahead.

David Simon: Hello, and welcome to our program entitled, "Do More with Less and More Easily: Top Ten Tips for Technology in 2008." My name is David Simon, and I'll be the moderator. My fellow panelists are Giuliano Chicco and Dave Munn. I'm going to ask each of you to introduce yourselves briefly, how you earn a living and some background on your technical expertise. Giuliano?

Giuliano Chicco: Hi. This is Giuliano Chicco. I'm the Practice Support Attorney at Johnson & Johnson. I've been – I've worked with lawyers for 40 years now in a variety of capacities. But, for the last 15 years or so, I've found myself at the technical end of the equation. So my responsibility at J&J is, wherever technology touches the practice of law, I sort of get involved. I manage four Web sites for J&J, the internal knowledge management site for the (low) department and all of our client facing sites all within our firewall.

David Simon: And Dave? Dave Munn.

Dave Munn: Hi, David. I have been a corporate lawyer for a little more than the last 20 years, I guess, an in-house lawyer. And I just started a new position two weeks ago at a company called Qantas Global where I'm the new general counsel. Qantas provides a Web 2.0 contract management platform, so I'm going to actually get to be on the other side in helping to develop some of these tools that we're talking about.

Previously I was general counsel at Pella Windows in Iowa, and most recently with a contract and attorney with Fair Isaac Corporation in Minneapolis where I worked to improve our contract processes through the use of technology. I've been writing and speaking on technology topics for about the last 10 years I guess.

David Simon: And this is David Simon, and I am the founder and President of WeComply, which is a provider of online compliance training and alliance partner and SLD cosponsor.

Personally, I was a practicing lawyer for 14 years before I got much more interested in technology than practicing law, then founded WeComply and have always been driven towards the newest delivery platforms, which is a passion that colors my techno tips, as you'll hear later on this afternoon.

The format for today's presentation will begin as sort of a round robin. Each of us has picked three of our favorite techno tips, and we'll explain them serially in little five-minute segments. That will give us nine tips, and we're looking to you in the audience to get your ideas for a 10th techno tip of 2008, and the way you can communicate that to us is through the chat window in the lower left corner of the user interface. You'll see a blank box at the very bottom. You type your message in there and hit the – click on "send," and every – today is a special feature. Everyone will see everyone's questions.

So if you have a specific question for me, David, or Giuliano or Dave Munn, you can address us by name. We'll all see each other's questions. If we can – if we can get to your question during our presentation, we certainly will. If not, we'll save some of them for some free time at the end. And I'd also ask you, at the very end, to take a minute to complete the evaluation form, and you'll see that in the link box on the left side of the interface. And that just let's you share your thoughts about how we can make these presentations as useful and enjoyable as possible.

So with that, I'm going to turn to Dave Munn, who is going to start us off with a couple of tips and tricks with Microsoft Outlook. Dave?

Dave Munn: Thanks, David. So we're going to be talking a lot today about Web 2.0 and SMS and all kinds of other cool new things. But I thought it might help to actually spend a little bit of time talking about some of the things that most of us work with on a day-to-day basis. And that's Microsoft Word and Microsoft Outlook. And those tools have been around for a long time, but what I find is that a lot of people really have never been trained in how to use it. You pick up things. You sort of figure things out, just what you need to know to get by, but what I want to do today is talk about a few little tips that I've discovered that I think can help make your lives just a little bit easier.

The first thing is that a lot of people don't realize that in Microsoft Outlook, you can actually keep multiple windows open at the same time just like with Internet Explorer where you can have multiple Windows open and flip back and forth between Web sites. You can do the same thing with Outlook.

It's not obvious when you go in how you do that, but it's actually pretty easy. If you're in Outlook, and let's say you're looking at your inbox and you hit control six, on the left side, the list of folders will expand so you can see things like your calendar, your contacts, your sent mail, outbox, and things like that. And if you go over to the left side, right click on something like your calendar, a menu will pop up. If you choose "open a new window" now you've got your calendar open in a new window. And this can be very helpful.

So, for example, if you're in your inbox and you're doing it the old way where you might just click on the calendar to look at something in the calendar, click back to the inbox, now you've lost your place in the inbox. So by keeping multiple windows open you can, you can have an inbox open, you can have your calendar open, you can have your contacts open, and you're flipping back and forth between windows without losing your place. So it's just something that a lot of people don't know about that is a little bit of a timesaver.

Another little trick you can use with Outlook is dragging and dropping. And dragging and dropping, you can actually create new items in Outlook from things that come into your inbox. So, for example, you get an e-mail from someone saying, "Let's get together for a meeting tomorrow at 9:00." And you could just go into your calendar, open up a new calendar item, start typing in all the information there. But instead of doing that, if you go back to your inbox and simply drag that e-mail over to that calendar icon, the folder on the left side that we opened up before, that will actually pop up a new calendar item window and all the information from that e-mail will be right there in the new window. So then you just have to fill in the time, little bit of other information, and you've saved all the information from the e-mail right into the calendar. So that's pretty handy.

You can do the same thing with contacts. So let's say you get an e-mail from someone (if they're out). It's got their contact information. I'd really like to add that person to my contact list. If you just drag the e-mail over to the contact side, and, on the left, you'll open up a new contact window, and the information isn't going to be populated where you want it, but at least it's there. You can just copy and paste or cut and paste to put it into the fields where you need it. So that's another thing that's pretty handy.

Something else that I think is really under-used in Outlook is public folders. And if your company uses Microsoft Exchange Server, which most companies do if you're using Outlook, you'll have a feature called public folders. If you don't see it, talk with your IT people and find out if you can get access to it.

I'm not going to go into a lot of detail about this because I – there's an article in the (aka docket wide artist 2002) that, where I've published an article that talks about creating a simple knowledge management system using Outlook Public folders. But it's so useful if you wanted to archive e-mail information or create a simply knowledge management system. It's also a way to get around what you probably have, which is limitation on the size of your mailbox in Outlook. Anything put into a public folder doesn't count in your e-mail limit. So it can be handy there.

It's also useful because you can share information if you have people in different offices; it's very easy to set up a system to share information so that everyone has access to the same information there.

Another thing I'm going to talk about is ((inaudible)). The purpose of this rule is, I'm sure we've all this experience of creating an e-mail, hitting "send" and then immediately realizing that, "oh, I shouldn't have sent that e-mail." Either it went to the wrong person or I didn't say something the way I wanted to. And a lot of times there's nothing you can do about that. There are limited options for retrieving e-mail once you hit the "send" button, but a lot of times those don't work. So I know I've seen it on the (small live on its list there are) e-mails from a couple of people saying, "Is there anyway to get back an e-mail I just sent that I shouldn't have?" Doesn't always work.

I'm not going to go through the details of how to set this up, but I'll – because you can get the materials from the Web site. I'll just say that it's very easy. Probably in about two minutes or less, if you go through these rules, you can set up a rule that will provide a one-minute delay. So when you hit that "send" button, rather than the e-mail being sent immediately, it'll actually set in your outbox for a minute or whatever period of time you choose, which often gives you time to go back and retrieve that e-mail, make changes to it, or just delete it so you don't send it again.

And the only downside to it is that sometimes if you're trying to send something quickly, it's a little bit annoying. But, other than that, I think on balance the number of times it's saved me is – it makes it worthwhile.

David Simon: So a couple of questions have come in. They're very specific in nature. Time is running short. We will take as many of these as we can after the fact, at the end of our presentation. And, if not then, then follow up offline with you to the extent we know the answers to these. And, if anybody online knows the answers, feel free to chat those in to your colleagues.

Next is Giuliano discussing some online client tools.

Giuliano Chicco: OK, thank you, David. One of the things – what we use – what I call online client tools, one of the things that I like to start with is the impact that the internet has had on the practice of law, and using the power of the internet to redefine the practice of law. This is particularly important for in-house counsel where traditionally legal service define practice – traditional legal services, the list on the left there, defines the practice of law at a typical law firm. And, unfortunately, too many in-house counsel bring this mindset with them when they go in-house.

And due to typical in-house restraints on budget and staff, the Internet provides an excellent platform to extend the reach and influence of a law department, generally by changing the – shifting the burden of the practice of law.

So I'm going to show you a couple of what I consider online client tools. The first one is the acquisition roadmap that we created for our clients here. This is a sample of an online tool designed for client use. In this instance, the target audience are the business development folks and the finance people with which we work. In that sense, it's just a 40-chapter online treatise. It was written by the law department and highly customized for a Johnson & Johnson audience.

The index on the left, if I click on the due diligence button here, expands. It's a nested index, which expands all the various chapters.

The index itself is arranged in chronological deal order, so you start at the beginning and work your way all the way to the end. And then the contents for each of these chapters were drafted by four of our M&A attorneys with collaboration and input from some of the business and finance folks.

So, if you click on the due diligence, the first link under number five, we get to the chapter on due diligence, and you'll see that each chapter contains case studies, red flag warnings, best practice, practice pointers in addition to substantive textual information.

All cross-references are hyperlinks. And every chapter has navigational arrows that allow you to advance or go back one chapter. Every chapter also contains the name and the e-mail link to the author of that specific chapter.

Now the purpose of this tool isn't so much to relieve the law department of this responsibility, the value is to create as sophisticated a client as possible so that problems get solved before they become problems.

Let me give you, for example, this is a tool that we created for copy clearance, so basically all advertising and copy has to be reviewed by the law department. It's another type of an online client tool, and this one was created by our regulatory folks for our marketing and advertising people.

Essentially, it's an online version of the copy clearance standard operating procedures. But the real, the interactive and interest part is item seven in the index, which is the copy clearance online tutor. This is an interactive decision tree and checklist. It covers the most frequent mistakes made in advertising copy and gives people an option to say, "Yes, I've covered that," or "no, tell me more." And the "tell me more" button actually brings up a page, which gives examples and preferred constructions of all of those specific sections.

And that's the end of my segment on online client tools. I'm going to hand it off to David Simon at this point.

David Simon: Thank you, Giuliano. Let's see if I can get it. Great.

One of my top techno tips is pick up the phone. And I don't mean it in the traditional sense, although we should probably all do a lot more of that than we are doing with e-mails and IMs instead. But experts have been predicting for the past decade or more that everything is converging on the phone. And, with good reason, I mean I think they got this one right. It's – I'm an early adopter of the iPhone. And my iPhone handles my e-mail, my calendar, music, maps, camera, some Web access and, of course, phone and text messaging. So there's a ton of power and functionality there. And I believe that we could be taking better advantage of that in the corporate environment than we may be doing now.

Another great thing about phones is the – they're so ubiquitous. Seventy-five to 84 percent of Americans have a cell phone. One hundred percent penetration is predicted within the next five years.

As a training company, it's rare that we run across a company that's able to reach everybody by e-mail or at a computer. Obviously in retail and manufacturing environments, that's just impossible. And so we're of the belief that using the phone to train is a way to reach more people than you're able to reach in really any other cost effective and convenient way.

The other thing we like about using phones in this manner is that they establish a connection with employees that's interactive and track-able. So unlike sending off a CD ROM or a video and hoping people watch it or use it, on the phone, you have a live connection that can be tracked right alongside other types of training activities.

And all of this is knitted together using age old, 50-year-old or more technology called IVR, interactive voice response technology, that's sort of glorified voice-mail. And you can set it up to dialogue with employees and have a reportable record of their participation.

And it may sound complicated, but it's really not. We use a service called (angel.com) and, for about $100 a month, you can have an account there and create your own IVR productions, whatever they may be, and up to 1,000 minutes a month is included in that $100 fee. So you can do an amazing amount of prototyping and actually working phone based applications for that $100 a month fee.

Some of the things we're doing with that that you may want to think about are using the phone to train, as I mentioned. And, if you'd like to try out an example of that, we have a harassment course by phone at a toll-free number. Here's the information that you can use to get on there.

And UACC members may have seen that we are doing quarterly ethic calls. They're automated ethics and compliance reminders. They last about two to three minutes each, and these are free of charge. The current one is on political activities that are acceptable in the workplace, and we're about to launch one for the next quarter on summer dress code. So these go out. Employees are asked to call this toll free number and just hear a two-minute presentation about an ethics or compliance topic, and even interact with it in a multiple choice quiz or similar kind of interactive activity. And we have one of those you can check out as well. So pick up the phone.

I'm going to give it back to Dave Munn to talk about some tips and tricks with Microsoft Word this time.

Dave Munn: Thank you, David.

David Simon: Here it comes.

Dave Munn: OK. I'll just talk about a couple of my favorite little tricks in Word. Most of us have had the experience of getting an e-mail with a Word attachment, opening it up and saying, "Well we need to make a couple of changes to this contract or whatever it is," trying to make the changes, and finding that you can't do anything with it. So you try to unprotect the document. You find out it's protected with a password. And so you can't do anything with it.

So the other party has probably used Word's protect document feature to restrict changes to the document, which you get to from the tools menu. And, depending on the options, you may not even be able to copy text from the document. So a lot of times people think, well I can just copy the text, paste it into a new document and work with it that way. That often doesn't work, though, if they've used some of the options.

Sometimes, in fact, you can't even compare, use the Word compare feature to compare it with a previous draft. So this can be a real problem if you're working on a contract negotiation and somebody sends you a new draft and you want to make sure that the changes that they made were agreed to. And, if you can't do a comparison, it's pretty hard to do that. There may be some third party tools that can get around that, but if you're just using Word, you can't – you probably can't do that.

So what can you do in that situation? Well, it turns out that it's actually extremely easy to get around the protection features in Word. I'll just go through it quickly. If you just save the document, open a new blank document, go to the file menu – or the insert menu – and choose file. Go to that file you just saved. Click on the file. Next thing you know, you've got a brand new document that has all the text, and it should bring in most of the formatting. About 90 percent of the time, when I do this, it works fine. There's a few times when header or footer information will be missing or something like that. But the important thing is, you can edit it as you would any other word document. Or you can run a comparison. So this is actually pretty handy a lot of times.

Now you could always go back to the person who sent it and say, "Would you please send me an unprotected document." But sometimes you just don't have the time to do that.

Now obviously you don't want to do this – you don't want to use this to make changes and not let the other side know what you've done to their document. Most people when they send you a protected document think it's really protected, and don't realize that you can actually get around it so easily.

Another tip is just making sure that the text in Word goes where you want it to go. I get a lot of Word documents where people have used tabs or spaces to line up text, so you get a signature block, for example, and you start filling in the name of your company, and all of a sudden the text is going on to the next line. And it's just making a mess of things.

So this is an example. You start typing in the name of the company, and now it's gone to the next line, and you have to spend a lot of time fixing things to make it look right. So it's actually pretty easy to make it so that that document will line up and be the way you want it to be.

And the way to do it is just to use tables, especially for things like signature blocks. Sometimes things like pricing information or anytime you have text that you want to make sure lines up just insert a table. So for a signature block, put in a two-column table with enough rows for whatever you need. Put the information in the table, and now you get something like this. And if you start typing in, say, "generic supply company," you put the name of the company in there; its not going to mess up the rest of your text.

If you don't like the way that looks, you can hide the gridlines. I'm not going to go into how you do that, but that's pretty easy to do too. And you end up with something like this that is pretty good looking. It makes your documents look more professional and reduces the aggravation factor just a little bit.

So, with that, I will turn it over to Giuliano. Giuliano, you may be on mute.

Giuliano Chicco: Sorry. We're going to talk a little bit about Web 2.0, and my first (part) is, "What is Web 2.0?" Everyone is familiar with Web 1.0. That's basically the Internet, as we know it now. It's this publishing, advertising, commercials, scholarship juggernaut. But generally most of the Web sites you'll encounter are one-way communications. So it's publication, pushing information out.

Web 2.0 is the next level or the next phase of Web publishing where it becomes a participation platform. These are applications that enable users to contribute Web site content or are specifically designed to collect that content. And examples, which some of us are already familiar with, wikis, blogs, social networking, Facebook, (that site), and folksonomies. And a folksonomy is basically is any Web site that allows for collaborative tagging or classification or indexing, where the general public is allowed in to categorize your content. And the most famous example of that is Yahoo!

Some of the examples of very successful Web 2.0 applications are eBay, Craigslist and, obviously, Wikipedia.

Now we've just started using Web 2.0 applications in, at J&J. This is the wiki site that we created for comprehensive care and surgical care (and well) team. These are the folks that support our medical devices businesses. This is published within the law department. The only people who are allowed to post are the people on that specific law team. And the only rule is that if they encounter – if they either write or read of find something that would of general interest to the team, they're supposed to post it on the wiki. And actually the page that you're looking at is the introductory page, which gives the basic instructions on how to do it. And I haven't heard a lot of complaining from attorneys, so it is possible to do.

A second type of Web 2.0 application is a blog. We don't have a blog policy, as yet, so there aren't a lot of blogs happening at J&J, although there are a lot of people campaigning for them. So there is a future for blogs, at least within the company, if not within the law department.

This is a blog that's maintained by (Ron Freedman). He is an attorney and a technologist and a long-time friend. And it mostly attracts creative uses of technology in the practice of law. It's actually, it's a worthwhile site if you're interested in the topic. But the advantages of a site like this internally would be that you can publish sort of an interactive newsletter and collect information and publish information in a sort of privileged area. If you send everything out by e-mail, you lose control. If you send information out via a blog, you don't have that sort of e-mail (address) of people clipping things and sending them to their friends or saving them locally. People comment on the blog and everything gets loaded to the server. So from document discovery purposes, a blog is probably better than e-mail.

The next example is this one. This is actually my (linked in) page, and I apologize for not filling it out better than I did. But this is the professional version of Facebook. And it provides the ability to network online with other folks who you've known, who you've met in the past or other attorneys who have similar interest. There was the last issue of (the aka) newsletter actually had an article about the limited success these sites have had. What I would advocate is that you could use something like a (linked in) internally for a controlled audience to use it to collect information about people and what they know and use it as an expertise database.

One other tool, which is useful for collecting information, I'm not sure if it's a classic Web 2.0 application. We use it extensively here at Johnson & Johnson. It's Inquisite. It's basically an online survey tool. And what you're looking at on the screen is a sample of an Inquisite survey that we prepared for one specific purpose.

Inquisite is one of a variety of online polling tools that are available. Generally they're licensed by the parent company. You may already have one if you work for a large corporation.

And, in addition to straight polling, you can use them for a variety of purposes. We've used it as an anonymous suggestion box. We've used it as a, for post-training or post-meeting reality checks to sort of feel what people were – how – was the meeting successful or not? What would you have liked to change? What should we do better next year? We used it for pre-meeting registration. We've used it for general information collecting. We've actually used Inquisite to collate a directory of people's home numbers and families. So it's limited only by your creativity.

And that takes me to the end of the Web 2.0 section. And I'm going to turn this over to – actually we actually have a slide at this point. So this is our dabble into Web 2.0 technology. And you now actually have the opportunity to let your voice be heard.

David Simon: So Giuliano, while we're waiting for people to respond, maybe you can share your thoughts on a question that came in. What are the records management issues and/or nightmares associated with a company sponsored Web 2.0 platform?

Giuliano Chicco: It depends on which direction the platform. If the platform is internal, there are certainly less than if it is an external platform. Most of the tools that I'm talking about are designed for the law department, so we tend to not worry about that too much because they are privileged. But the same thing with the blogs, we are now, the law department is in the process of drafting a company-wide policy on use of blogs and Web 2.0 technology. I haven't seen the draft versions of it yet, and, but, we know that there are a lot of businesses out there who are chomping at the bit to get onto this platform, both for commercial reasons, for advertising reasons, for communications purposes. So time will tell.

David Simon: Yes. (I was going to say) I would actually say that the records management issues are probably less than they are with e-mail because here all the information is gathered in one place. And, if it's set up so that the company can search it and monitor it, and even, say, for example, have automatic retention times on the information that's in there, it's probably a lot better than e-mail, which is scattered in everybody's inbox and all over the place. It's pretty much uncontrolled and very difficult to search.

Giuliano Chicco: And the other thing, like most online tools, you do have a fair amount of control. You can moderate the site. You can delete offensive materials should they appear. We sort of trust our employees and hope that they wouldn't do sort of reprehensible things, but you know, stuff happens. So you do have a lot more control than you would have with straight e-mail system.

David Simon: Well, it appears that about 25 percent of our audience has already adopted some Web 2.0 within their law departments. That's a surprisingly high number, to me at least.

Male: But helpful.

David Simon: All right, Giuliano, if you want to pass me the baton.

Giuliano Chicco: OK, you've got it.

David Simon: OK. So I'm still in my hang (up), so to speak, with the phone. And presumably most of you know what SMS is. It stands for small messaging service. It's a.k.a. text messaging. I hope you've all at least tried it. I know your teenage sons and daughters are doing it, probably as we speak.

And it's an incredibly powerful, relatively new medium. And, again, one that's probably under-utilized in the corporate environment, but maybe there's some potential there for greater up take.

Just in terms of the raw numbers, about half or upwards of half of all mobile subscribers are active text messengers to the tune of about a billion messages each day. And the numbers are skewed particularly in favor of the younger generation, the so-called millennials who are gradually bringing IM and text messaging into a first position ahead of e-mail. So it's definitely a medium to be reckoned with.

I've seen it applied successfully in both a push context and a pull context. Up here, in New York, when there's some inclement weather, I'll get a text message at 5:30 in the morning from the local school district telling us that there's a two-hour delay or no school today. So that's an extremely effective way to push out information to a wide range of people who may not be signing onto their e-mail accounts for several hours but there's information you need them to get right away.

And it's also being used on college campuses for workplace violence notifications. And, just a couple of weeks ago, there was an item in the New York Times that the FCC, I believe, has approved a nation-wide application of a text messaging emergency notification plan that's supposed to be implemented by 2010 for terrorists attacks and the like.

On the other side are the poll applications of this. I know that at least one test preparation service will let you test yourself by texting in answers to quiz questions. Well, first of all, you sign up and you're texted a question. You respond accordingly, and, within a couple of seconds, you get feedback on your test answers. So you can take as many practice questions as you have time for wherever it's convenient for you to do that.

And we've tried to apply the same sort of protocol to compliance quizzes. So rather than just counting on your training to keep people, keep compliance front of mind for your staff, training once a year or every other year, now you can text out to them little compliance reminders or quizzes and take advantage of a medium that might surprise them a little bit and stand out from the ordinary din of e-mail communications.

Again, this is not rocket science, nor is it particularly expensive to implement. I stumbled onto a product called the SMS finder. It cost $1,000 retail. Just out about a month ago. And it's smaller than a breadbox, about the size of a transistor radio. And, if you put a little SIM card in there like your iPhone has or like a lot of phones have and buy the unlimited texting package for about $20 a month, you can send out up to 20,000 text messages at a time, and you can script this little unit to respond appropriately depending on what's texted to it. So you can set up those reminders, those emergency notifications, and you can trigger them remotely by texting in from your own phone a code that will trigger an appropriate message out to your defined audience.

So here again is a very cost effective sort of high tech way to communicate in ways that you may not have already tried.

So, onto Dave Munn for round three, "Document Assembly Made Easy."

Dave Munn: Thanks, David. So, up to now, I've talked about some fairly basic technology, Microsoft Outlook, Microsoft Word, and, in a lot of ways, this is old technology. It's been around for a long time. It's provided, certainly, some improvement in productivity but not maybe the leap in productivity that we'd like.

So the next step is to look at document assembly. And that's sort of Microsoft Word on steroids would be one way of looking at it. Here's kind of a lengthy definition, but I think the important thing here is that we're starting to move from tools like Word and Outlook and Excel to more systems where things are actually taking place that are more efficient and are more of a process rather than just a tool. And one of the most important things to think about when using something like document assembly is the end of this slide where you can create documents that are free of hidden, harmful (meta-data), which has been an issue that's risen its ugly head in the last few years, that often comes along with documents that are created in Microsoft Word.

When I look at the way lawyers produce documents today, in a lot of ways, there are the same – we're using the same processes that we've used for decades. I mean certainly going back for the 20 some years that I've practiced law, we have better tools now. But the fundamental processes are really the same. And I think the future is really to go from just using the tools to using something like document assembly. Even document assembly I think is just a step on the way to systems that can actually, fundamentally change the way we create documents, the way we run our departments, certainly something like a contract process document assembly is the next step, but probably not the end.

So what are some of the advantages of document assembly? Well, one is you can create standard documents faster, more accurately. You can share best practices. So, if you've got five lawyers in your department, rather than each of them saying, "Well, I like having a limitation of liability clause that says this," and somebody else having a different idea about that, you can all be on the same page. You can be sharing the same forums, the same clauses. Even if you're operating in offices around the world. And, again, eliminating (meta-data) is a big advantage to creating a document from scratch using – when I say creating a document from scratch, I mean creating a new draft of a standard document from a document assembly tool. Generally there will be no (meta-data), at least until you start editing that document.

So what I've tried to do is just to list a few of the programs that are out there today that seem to be easy to use and relatively low cost. There's certainly a lot of programs out there that either require a fairly high investment or require extensive training or consulting services. So I've ((inaudible)) those and I've tried to provide a list of some things that are relatively inexpensive and easy to use. At least on, at least my little bit of research into this indicates that.

I have some experience with (Q shift). When I was with Fair Isaac, we set up (Q shift) to automate a number of our sales contracts. And found it to be beneficial because it, first of all, forced us to go through a process of standardizing the language, standardizing all our contracts so the contracts for all our different products and services had a similar look and feel. So just doing that exercise was very helpful. And then automating it was, on top of that, an additional benefit.

So most of these systems either work within Word or they'll create a standard Word document that you can just edit, e-mail, whatever you normally do with documents.

In the future, I think there are going to be more of the document assembly vendors that are going to partner with other vendors, so, for example, people who have automated filing or automated document management services. And, again, Web 2.0 is going to play a real role in how these things are rolled out.

Another thing that this will lead to is more things like self-service contract creation. So, where a lot of things that might be relatively simple, straight-forward contracts, there's probably no reason why you can't have business people going into a system and using a document assembly tool to create their own documents.

A few issues that I've run into. One, there's always a certain amount of training involved. You can't underestimate the amount of training that you should have for your people just to make sure that everyone is using the tools effectively. It does require a change in mindset. There are a lot of lawyers who think, "Oh, I've been doing it this way forever. I like doing it this way, and I'm not going to change."

Also, it can be somewhat labor intensive. Putting the size of contracts into the (Q shift) system was relatively easy, but, over time, the maintenance can get to – maintenance of those forms, if you want to make changes and update them, although it's much easier than just having a library of Word documents, still can be fairly labor intensive. So I think this is an opportunity to use some low cost resources, whether it's offshoring or outsourcing this to someone who can do it more efficiently than you can.

So the last thing I'll say about it is, just give it a try. There are a number of these tools that give the option of a no-cost trial. So you really have nothing to lose other than a little bit of time to go out and try it.

So I will turn it over to Giuliano.

Giuliano Chicco: Thank you, David. All right, I'm going to spend the – what I hope will be the last five minutes on some technology bon-bons, these little giveaways. I probably should have started with these. But, in any event, let's go right into this.

Microsoft properties field. Now we've heard a lot of talk about (meta-data) being bad and stripping it from documents. I'm advocating putting more of it in. And the reason I picked the properties field is that most people overlook it or use whatever the default is in that field, which comes set up when you get, whenever Word or Microsoft Office is installed on your machine.

The reason I pushed the properties is that they're what search engines use to identify search results in, on a server. So before I load any Word documents or Excel spreadsheets or PowerPoints onto our law department server, I make sure that the property fields are completed and have very descriptive information there. They also – that's just tan assembly page. They are also a good source for basic forensic information about a document.

One trick that I do is, if I'm writing an essay for an essay contest or something like that where I have to write 300 words. I will write my essay and then check the properties to count the words so I don't have to count them manually.

Favorites. Everybody has favorites in their browser, but few folks take the time to organize them. I've gone to sit at other people's computer and pull down their favorites, and, you know, they go on for 80, 90 links. I just did a screenshot of one of my favorites. I have about 4,000 saved favorites. And every time I stumble across a promising Web site, I just take a couple of seconds to add it to my favorites in the appropriate subfolder. I have subfolders up the (wa-zoo) here.

Another tip with this is, when you save it, even if you're saving it in an organized, categorized fashion, don't settle for the default tag, whatever the Web site owner decided to name his site. You can rename the site something very distinctive, perhaps a feature that attracted you to the site in the first place.

So when I – I have a subfolder for Web design. I have a subfolder within that for colors, different color sites. I will take the – I'll say nice color wheel or something that I found attractive or useful on the site so that I remember what it was or why that link was there.

This BlackBerry tip allows you to change applications without backspacing to the main menu. When I first posted this tip on our internal Web site, I got two thank you notes from attorneys, which is something that doesn't happen very often, so I assume it's a hot tip.

It works just like the alt tab combination on your keyboard in Microsoft. If you guys don't know that, try it now. Alt tab will just tell you what all your open windows are and let you move from one application to another. But this will – and I won't read it for you. You can go back and you'll get copies of these slides. You can just do this yourself. It basically let's you switch from your calendar to your e-mail to your notepad without having to go back to the home page. And it's very handy if – particularly if you're on a BlackBerry, you're probably rushed for time anyway.

The other tip I have for you is visit the BlackBerry Web site. This tip was there. There's three or four others, which were meaningless to me, but may be really valuable to you, and I suggest you go out there and take a look at them.

This one is one that I actually use a lot. If you're like me, you generally have a dozen windows open at any given time. Whether they're multiple e-mail messages or just multiple applications like I'm one to have, this shortcut let's you shut down, you know, as many as you want at one time. And basically if you can – you can see on the bottom of the screen, anything that looks depressed is a controlled – you basically hold down the control key, click all the windows you want to close, and then when you right mouse click on any one of those, the pop-up comes up, hit "close," and they all shut down at the save time. And that just saves you having to open a window, hit the little X box and then do the next one.

Screen shots. You've seen a lot of screen shots in these slides. Most people are familiar with control and print screen, which gives you a shot of whatever's on your monitor. I like alt and print screen, which only gives you a shot of whatever the top open window is. And the most useful thing with this is, particularly when you get an incomprehensible error message, you do alt print screen, and now you have a copy of the error message in your memory. Open up Outlook. You write to your helpdesk, and paste the message in, and then you don't have to explain to them what was wrong. And it gives – you can actually tell them what you were doing when the message came up, and usually that's enough information for them to sort of be able to figure out how to fix it.

And I think that accounts for my five minutes. And I'm going to give it back to David.

David Simon: Got it.

Giuliano Chicco: (There you go).

David Simon: Thanks. I just tried that alt print screen while you were talking. It worked like a charm.

So user-generated content is one type of Web 2.0 application. And most people are familiar with YouTube as the, sort of the quintessential example of user-generated content. But why not make some YouTube type applications for the corporate environment? It's not being done much that I've seen or heard about, but I think there's lots of upside potential there.

So one example of this that you may be familiar with outside of corporate, besides YouTube, is (story core) on national public radio. To me, that illustrates better than anything else the power of people's stories. And so what we've done in our training endeavors is to ask in-house attorneys or private attorneys to sort of stand and deliver, to stand in front of a camera and talk about war stories or interesting incidents or case files that – from which they derived a message, some learning of their own, some advice that would be helpful to employees. And many people find those stories as useful, if not more so, than vignettes that are scripted or other types of learning modalities.

So these are not, once again, expensive, high quality, necessarily, videos, just like you see on YouTube. For example, the one that's up on this slide appears to be shot in a law library with an active monitor behind the speaker. In fact, it was just shot against a piece of green fabric, and the background was composited there with a $200 piece of software. So you can get amazing results from very little high technology or expense with just a little creative effort.

Now one example of user-generated video being used in a corporate environment is HP uncut. Hewlett Packard launched this internal YouTube not very long ago, I think last year, where HP employees make their own videos demonstrating best practices for using HP products. And they upload them to the corporate Web site.

If – now there's a rating system, a viewer rating system just like YouTube has, so that the cream rises to the top. The best videos are rated the highest. They're viewed the most. And it's a great way to winnow out the best content from the not so good, and just let the best stuff rise without having to spend a lot of time editing what's there. So virtually anything goes as long as it's not abusive or inappropriate, and the good stuff will find its audience. That's the theory anyway.

HP reports tremendous benefits in terms of employee engagement. They say that employees from all age groups and across diverse organizations and affiliations have submitted videos, and that some of the most active participants turn out to be senior executives. And they report that their most popular video category is "How I Do It." So it's that showing rather than telling kind of experience that people find valuable.

We, as in WeComply, have talked to the ACC about doing something similar in the ethics and compliance arena. We have a very rough prototype called (ethicsexchange.com). It's a portal that, for which we solicited some user generated video content. If you have a minute and check it out, you'll see examples of in-house attorneys explaining (use era), the military leave statute through a nursery rhyme. You'll see role-playing for questionable interview questions in a game show format, and a few other examples of creative, user-generated content that might find its home in the corporate market.

So we have five minutes left, and we've covered our favorite nine techno tips, and we were hoping that some of you would submit some contenders for a 10th one, but I'm not seeing anything in the chat window.

Let me – if there are any questions, you have just a couple of minutes to chat them in. Let me suggest what I thought the, a 10th tip might, that might emerge from today's presentations, and that is this chat channel itself. We took the liberty, this time, of opening up the chat channel so that not just the presenters would see your questions and comments, that all of you could see each other's questions and comments. And the theory there was that there is wisdom of the group that sometimes the chat channel brings to bear in ways that would be unthinkable if we were all sitting in a lecture hall at the annual meeting or a similar, you know, (CLE) presentation simply because, to be polite, we really shouldn't be chatting with each other while the presenters are presenting.

But here's a situation, this chat window that's pretty much ubiquitous now with any Web seminar where people have a change to exchange ideas with other members of the audience in addition to the presenters. So, in certain environments, that creates a certain wisdom of the group that can inform the presentation beyond even what the presenters and individuals in the audience might bring to it. So I would urge you to try the same experiment we did in your online teaching efforts and see if you can tap in to the wisdom of the group.

Dave Munn: David, I had a couple of comments I wanted to make at the end. There was one question that I was able to answer through the chat. There was another one that I did not have a good answer to regarding archiving of calendar items. I may be able to come up with something if I do a little research, but I don't have anything off hand.

I also wanted to mention, Giuliano talked about the properties field. I agree that having the properties, having information in the properties window is – can be extremely valuable. It can also lead to some big problems. I've seen documents that had – if lawyers are using the old fashioned way of creating documents, which is finding the document you did for the last deal, pulling it up and making changes to it, and information is in that properties field and doesn't get updated, you can have a very embarrassing situation. And I've seen documents that went out to customers with information about other deals in that properties window. So that just be aware if you're not using something like document assembly or another way of creating a fresh document every time, there's a real danger there.

Also, I should have provided the link to the (dock it) article from 2002. It's very easy to find. Someone did provide it in the chat, but, if you just go to the ACC site and search for Outlook public folders, you'll get links to that article. It's very easy to find.

David Simon: Thanks, Dave. Giuliano, we have just a minute left. Do you have any closing thoughts?

Giuliano Chicco: No. I'm online, just sort of reading through the chat to see if there's anything that I can comment on, but I don't.

David Simon: All right. Well let me just ask you once again to take a minute to fill out the webcast evaluation. You'll find the form in the links area on the left side of the screen. I'd like to thank you all for attending. And thanks especially to Dave Munn and Giuliano Chicco. And we're done now, so thank you very much, and you may now disconnect.

END