

# The Need To Be More Productive With Less Budget – Can Technology Help?



Paul E. Petruska & Julia Voss  
Greensfelder, Hemker & Gale, P.C.

October 21, 2021

# **The Need to be More Productive with Less Budget – Can Technology Help?**

Paul Petruska & Julia Voss  
October 21, 2021 | ACC St. Louis

# My Experience

2013 new business plan to grow Net Operating Profit from \$4.5 billion

## Financial highlights

in USD millions, for the years ended December 31, unless otherwise stated	2015	2014	Change <sup>1</sup>
Business operating profit	2,895	4,646	(38%)
Net income attributable to shareholders	1,859	3,986	(53%)

# My Experience

- 2016 through 2019, everyone has less money in their budget
- Old CEO and CFO were fired
- The New CEO had a new plan
- CUT 1.8 BILLION in expenses in three years.



# Power Point Tip

- Use Designer to modernize your slides

# My Experience



2013 – Corporate has new plan to grow net operating profit from \$4.5 billion

The Result?

## Financial highlights

in USD millions, for the years ended December 31, unless otherwise stated

	2015	2014	Change <sup>1</sup>
Business operating profit	2,895	4,646	(38%)
Net income attributable to shareholders	1,859	3,986	(53%)

## 2016 – 2019 Less Budget



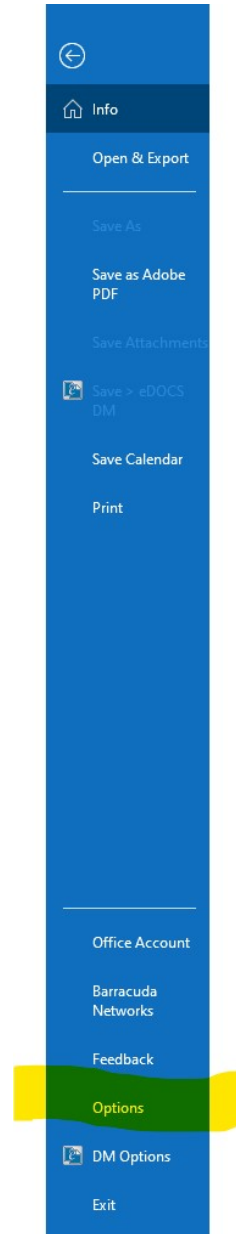
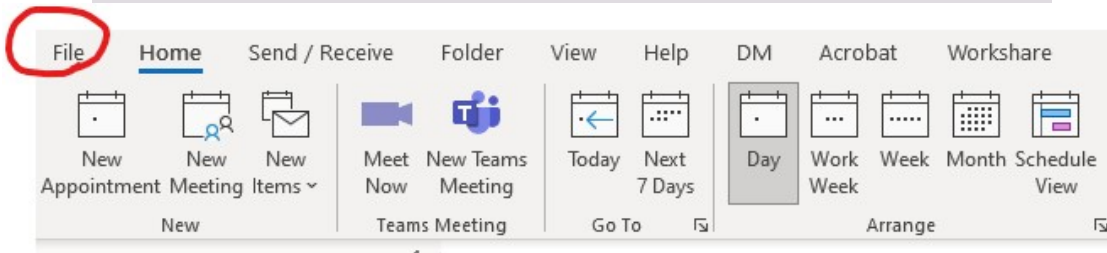
Old CEO and  
CFO fired

New CEO has  
new plan

Cut 1.8 billion  
in expenses in  
three years

# MS Outlook Calendar

## Tip 1



### Outlook Options

- General
- Mail
- Calendar**
- People
- Tasks
- Search
- Language
- Accessibility
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-ins
- Trust Center



## Work time



Work hours:

Start time: 8:00 AM

End time: 7:00 PM

Work week:  Sun  Mon  Tue  Wed  Thu  Fri  Sat

First day of week: Sunday

First week of year: Starts on Jan 1

## Calendar options



Add online meeting to all meetings ⓘ

Default duration for new appointments and meetings: 30 minutes

Shorten appointments and meetings: None

Less than one hour: 5 minutes

One hour or longer: 10 minutes

Default reminders: 15 minutes

Allow attendees to propose new times for meetings

Use this response when proposing a new meeting time: ? Tentative

Add holidays to the Calendar: Add Holidays...

Change the permissions for viewing Free/Busy information: Free/Busy Options...

Enable an alternate calendar

English Gregorian

When sending meeting requests outside of your organization, use the iCalendar format

Show bell icon on the calendar for appointments and meetings with reminders

# MS Outlook Calendar Tips

Set Preferences

Work Hours

Default For Meetings

Shorten Time



Add Holidays

Design Issues



# ADDITIONAL CALENDAR OPTIONS



Default calendar color:  

Use this color on all calendars


Show week numbers in the month view and in the Date Navigator

When in Schedule View, show free appointments

Automatically switch from vertical layout to schedule view when the number of displayed calendars is greater than or equal to:

Automatically switch from schedule view to vertical layout when the number of displayed calendars is fewer than or equal to:

### Time zones

 Label:

Time zone:

Show a second time zone

Label:

Time zone:

Show a third time zone

Label:

Time zone:

### Scheduling assistant

Show calendar details in ScreenTip

Show calendar details in the scheduling grid

### Automatic accept or decline

Automatically accept or decline meeting requests.



# MS Outlook Calendar

## Tip 2

- You can see multiple days or multiple weeks without going date by date
- Use mouse to select dates or weeks on the month view calendar (generally on left)



# MS Outlook Calendar

## Tip 3

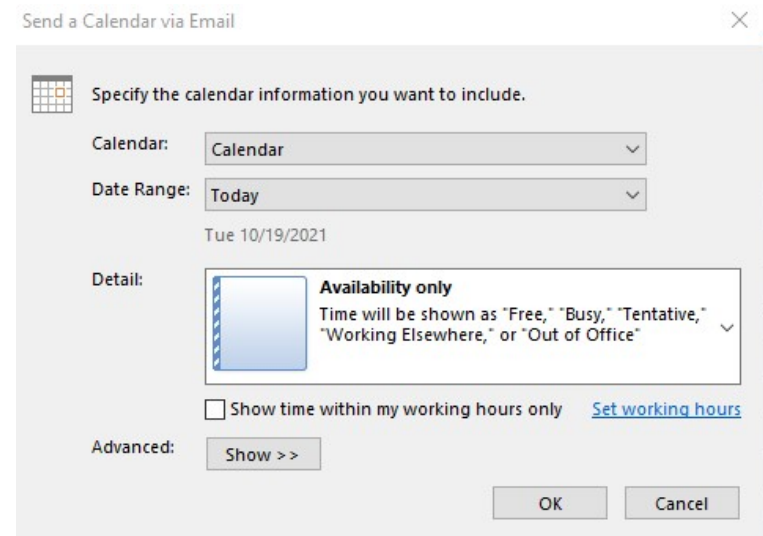
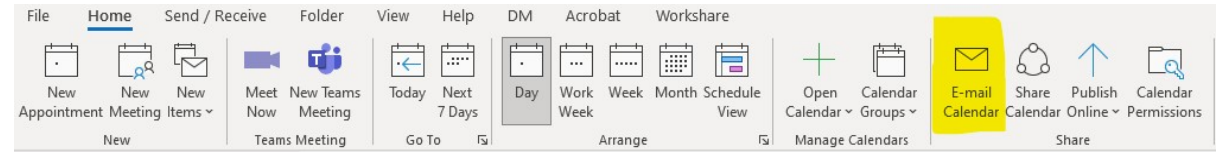


What if someone emails you asking when are you available from January 1 through January 15, 2022?



You can email them back with all options in less than 30 seconds

# HOW TO FOR TIP 3



**Paul E. Petruska Calendar**

[ppetruska@greensfelder.com](mailto:ppetruska@greensfelder.com)

Tuesday, October 19, 2021 – Monday, October 25, 2021

Time zone: (UTC-06:00) Central Time (US & Canada)

(Adjusted for Daylight Saving Time)

**October 2021**

Su Mo Tu We Th Fr Sa

						1	2
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	<a href="#">19</a>	<a href="#">20</a>	<a href="#">21</a>	<a href="#">22</a>	<a href="#">23</a>	
<a href="#">24</a>	<a href="#">25</a>	26	27	28	29	30	
31							

- Busy
- Out of Office
- Tentative
- Working Elsewhere
- Free
- Outside of Working Hours

**October 2021**

**Tue, Oct 19 – Wed, Oct 20**

<input type="checkbox"/>	Before 7:30 AM	Outside of Working Hours
<input type="checkbox"/>	<b>7:30 AM – 4:00 PM</b>	<b>Free</b>
<input checked="" type="checkbox"/>	4:00 PM – 6:00 PM	Busy
<input type="checkbox"/>	<b>6:00 PM – 7:00 PM</b>	<b>Free</b>
<input type="checkbox"/>	After 7:00 PM	Outside of Working Hours

**Thu, Oct 21**

<input type="checkbox"/>	Before 7:30 AM	Outside of Working Hours
--------------------------	----------------	--------------------------

**Thu, Oct 21**

<input type="checkbox"/>	Before 7:30 AM	Outside of Working Hours
<input type="checkbox"/>	<b>7:30 AM – 8:00 AM</b>	<b>Free</b>
<input checked="" type="checkbox"/>	8:00 AM – 1:00 PM	Busy
<input type="checkbox"/>	<b>1:00 PM – 7:00 PM</b>	<b>Free</b>
<input type="checkbox"/>	After 7:00 PM	Outside of Working Hours

**Fri, Oct 22**

<input type="checkbox"/>	Before 7:30 AM	Outside of Working Hours
<input type="checkbox"/>	<b>7:30 AM – 5:00 PM</b>	<b>Free</b>
<input checked="" type="checkbox"/>	5:00 PM – 7:00 PM	Busy
<input type="checkbox"/>	After 7:00 PM	Outside of Working Hours

**Sat, Oct 23 – Sun, Oct 24**

<input type="checkbox"/>	All Day	Outside of Working Hours
--------------------------	---------	--------------------------

**Mon, Oct 25**

<input type="checkbox"/>	Before 7:30 AM	Outside of Working Hours
<input type="checkbox"/>	<b>7:30 AM – 10:00 AM</b>	<b>Free</b>
<input checked="" type="checkbox"/>	10:00 AM – 10:45 AM	Tentative
<input type="checkbox"/>	<b>10:45 AM – 4:00 PM</b>	<b>Free</b>
<input checked="" type="checkbox"/>	4:00 PM – 6:00 PM	Busy
<input type="checkbox"/>	<b>6:00 PM – 7:00 PM</b>	<b>Free</b>
<input type="checkbox"/>	After 7:00 PM	Outside of Working Hours



MS OUTLOOK  
CALENDAR TIP 4



# Scheduling Assistant



File Meeting Scheduling Assistant Insert Draw Format Text Review Help Workshare Tell me what you want to do

Insert Delete → Forward Teams Meeting Meeting Notes Cancel Invitation Address Book Check Response Names Options Show As: Busy Reminder: 15 minutes Recurrence Categorize

IOCS DM Actions Teams Meeting Meeting Notes Attendees Options

**You haven't sent this meeting invitation yet.**

**Send**

Title **ACC Presentation**

Required **Tara L. Clement** **Lora E. Wegman** **Russell K. Scott**

Optional

Start time **Tue 10/19/2021** **12:00 PM** **Central Time (US & Cana)**  All day  Time zones

End time **Tue 10/19/2021** **1:00 PM** **Central Time (US & Cana)** [Make Recurring](#)

Location

File Meeting **Scheduling Assistant** Insert Format Text

Refresh Availability AutoPick Scheduling

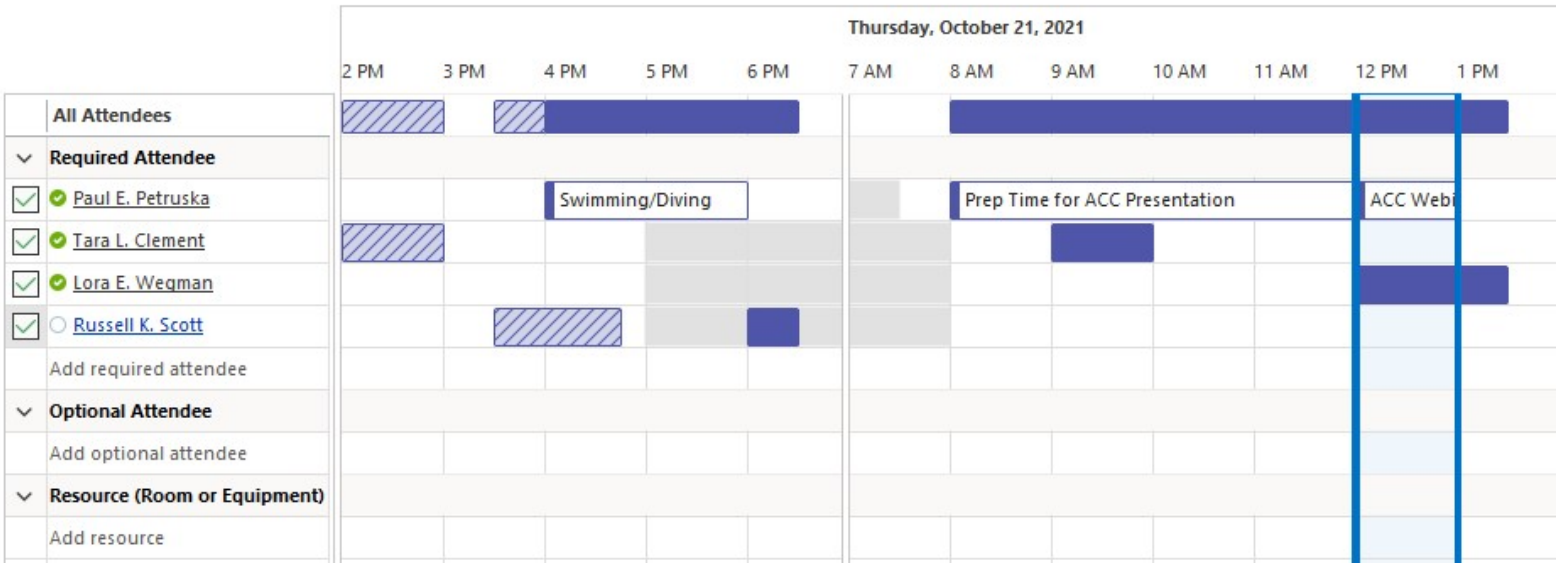
Add Attendees Add Rooms Attendees Room Finder

Options Options

Send

Start time Thu 10/21/2021 12:00 PM Central Time (US & Cana)  All day  Time zones

End time Thu 10/21/2021 1:00 PM Central Time (US & Cana) [Make Recurring](#)



# MS Outlook Calendar Tip 5



My personal favorite



Saves time scheduling deadlines



Saves time looking back for the day of the week on a specific date



Control G

# MS Outlook Email Tip 1

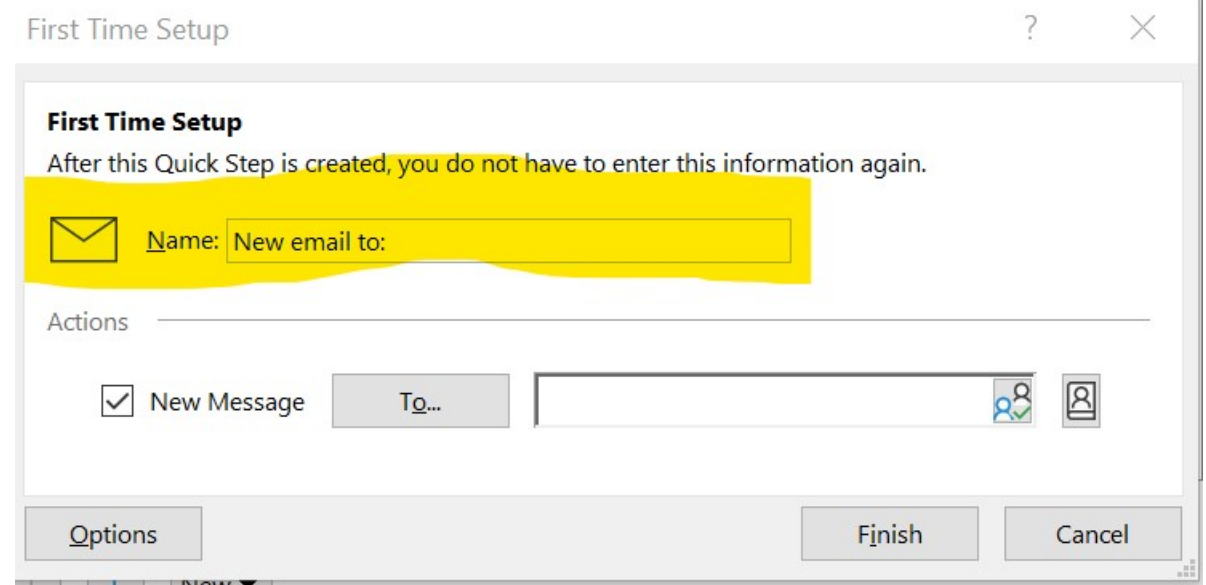
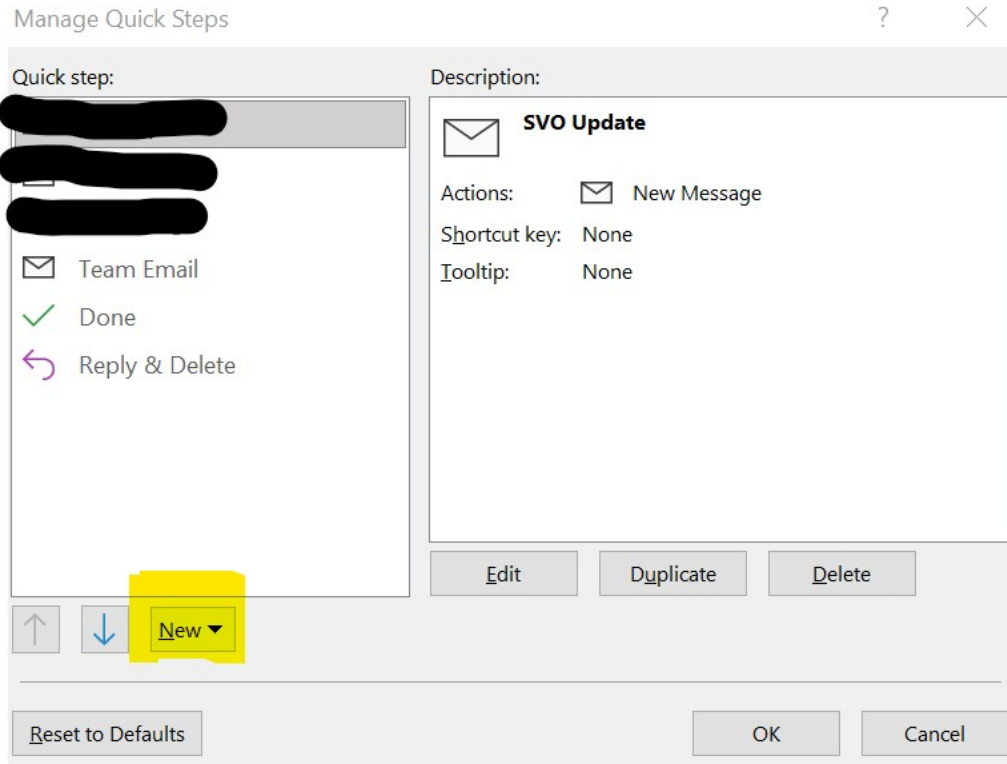
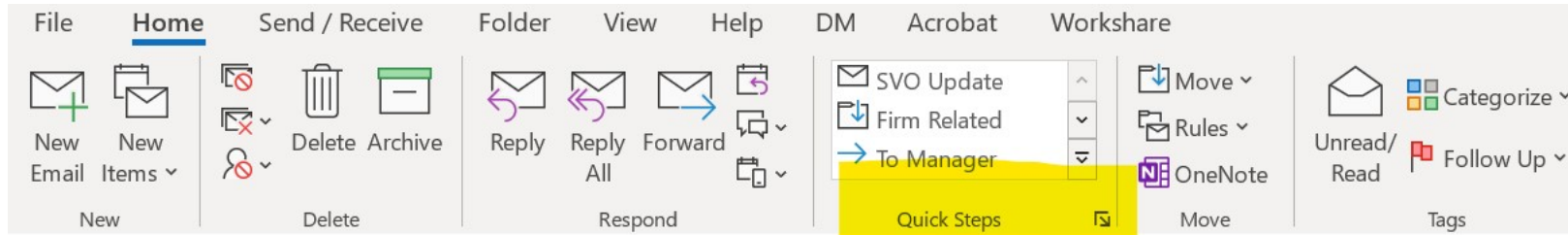


Use Quicksteps to set up  
a form email

It saves time

It makes it easy when  
someone says remove me,  
or add person Y

It avoids typos or errors in  
the email address





## First Time Setup



### First Time Setup

After this Quick Step is created, you do not have to enter this information again.

 **Name:**

Actions 

---

New Message   

**Options**

Finish

Cancel




**Name:**

Edit the actions the quick step performs.

Actions 

---


 New Message    




[Hide Options](#) 

[Add Cc](#) [Add Bcc](#)

**Subject:**

**Flag:**  

**Importance:**  


**Text:**

Automatically send after 1 minute delay.

**Add Action**

Optional 

---

**Shortcut key:**  

**Tooltip text:**

Save



Cancel


**Name:**

Edit the actions the quick step performs.

Actions 

---


 New Message  

**Show Options** 

**Add Action**

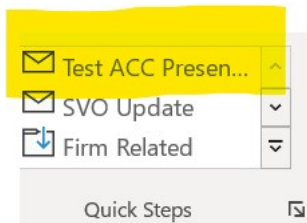
Optional 


---

**Shortcut key:**  

**Tooltip text:**

Save Cancel



 Send	To	<input checked="" type="checkbox"/> <a href="#">Paul E. Petruska</a> ; <input checked="" type="checkbox"/> <a href="#">Kathryn Hahn</a> ; <input type="checkbox"/> <a href="#">Julie A. Pointer</a> ; <input checked="" type="checkbox"/> <a href="#">Alison Craghead</a> ; <input checked="" type="checkbox"/> <a href="#">Lora E. Wegman</a>
	Cc	
	Bcc	
Subject		October 21 ACC Presentation

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MS Outlook  
Email Tip 2



Click clean up  
button for  
redundant emails

Use the clean up  
tool for more  
advanced cleanup

## MS Outlook Email Tips 3, 4 and 5



DRAG EMAIL TO  
CALENDAR OR TDL



DOCK CALENDAR  
IN EMAIL



CONTROL 1 AND  
CONTROL 2

# HOTdocs

## USER 11

### Document Creation Software



- Hot Docs is just 1 option
  - Easy Creation
  - Goal is zero edits

Version: 11.2.1 Build: 20160218

License Renewal Date: Tuesday, August 16, 2022

[More Info](#)



# Using Technology to Streamline Document Review



# What is a Document Review Platform?

The screenshot displays the One platform interface. On the left is a navigation sidebar with options like Documents, Reporting, Case Admin, Index Admin, Job Admin, Application Admin, Workspace Admin, and Indexing & Analytics. The main area shows a search bar with 'Keyword Search' and 'Enter Search Terms'. Below this is a filter section with a 'Filter' input and a 'Condition' dropdown. A line chart titled 'DateSort\_Script\_DT' shows data from Jan-2012 to Jan-2021. Below the chart are two pie charts: 'Top 50 File Ext' showing 99.8% for MSG (1,918) and 0.2% for EML (3); and 'Top 50 Record Type' showing 99.2% for Email (1,906) and 0.8% for Attach (15). A table below shows a list of documents with columns for #, DOC ID Beg, Group Identifier, Level, FileName, and All Custodians. The first row shows document CTRL\_00008727.

The screenshot shows the document preview interface for document CTRL\_00008727. The document is an email with the subject '[LIMA] (PCA-80118) Update HSG and EMI logos'. The email content is displayed in the main area, with some text highlighted in yellow. On the right side, there is a 'Coding Layout' panel with various fields for document information and coding. The 'Document Information' section includes fields for DDC ID Beg, All Custodians, From Email, and FileName. The 'Document Coding' section includes fields for Responsiveness, Objectness, Not Responsive Production, 1st Level Privilege, 1st Level Redaction, Significance, Confidentiality, and Issue Tags.

# Why use a Document Review Platform?



Organizes multiple sources of data in one location



Allows lawyers to annotate documents



Allows efficient production of documents

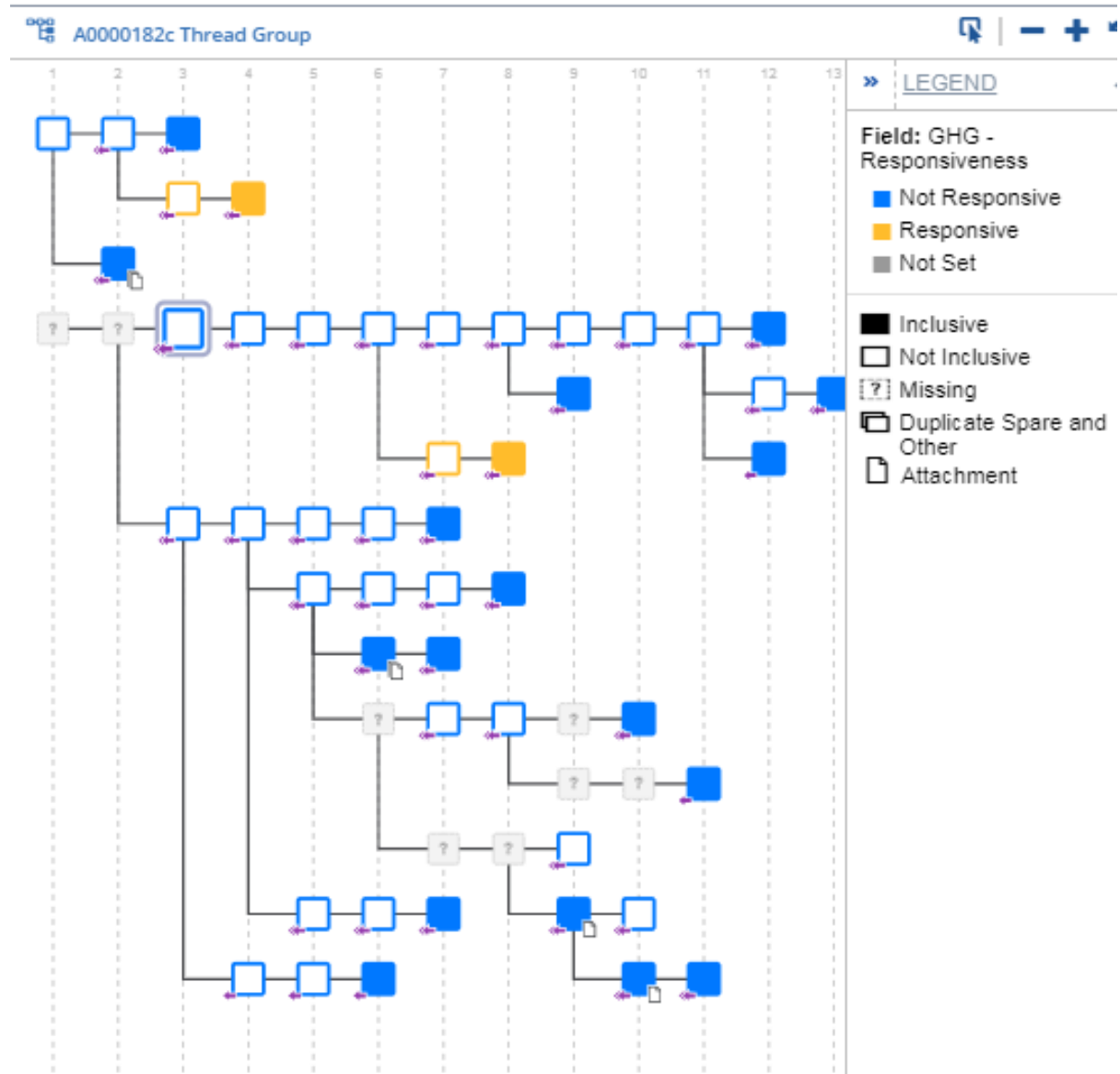


Scalable – can handle matters with 100's of documents to matters with 100's of thousands of documents

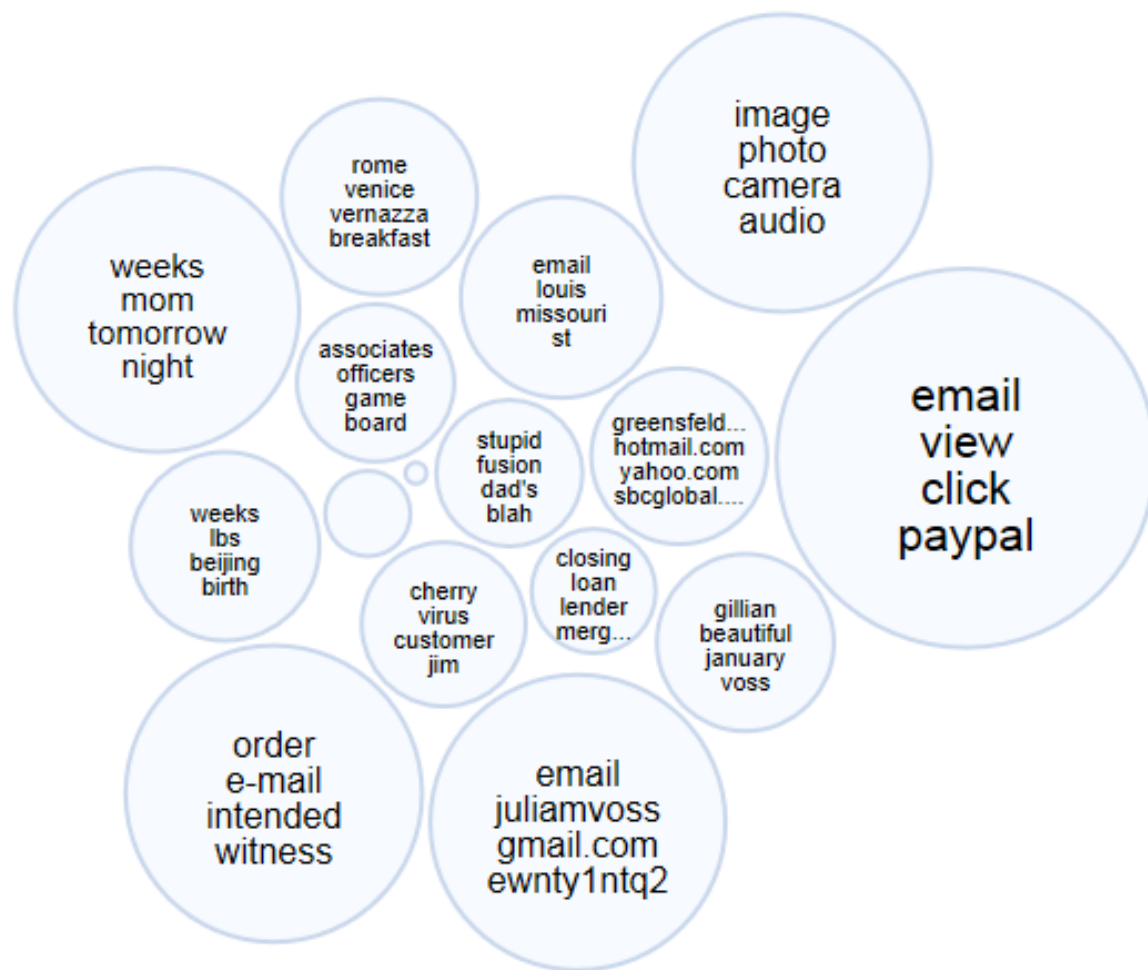


Cuts down on wasted attorney review time

# Email Threading



# Clustering





## Produced Docs AL Project

[Project Home](#) [Review Statistics](#)

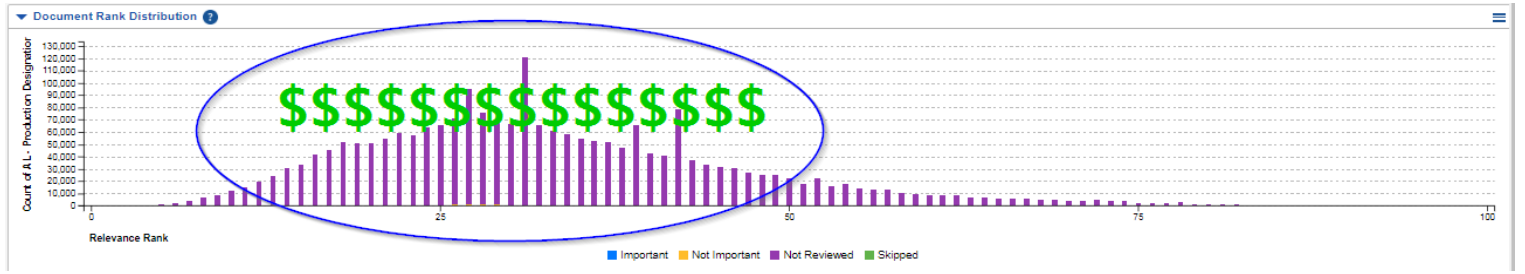
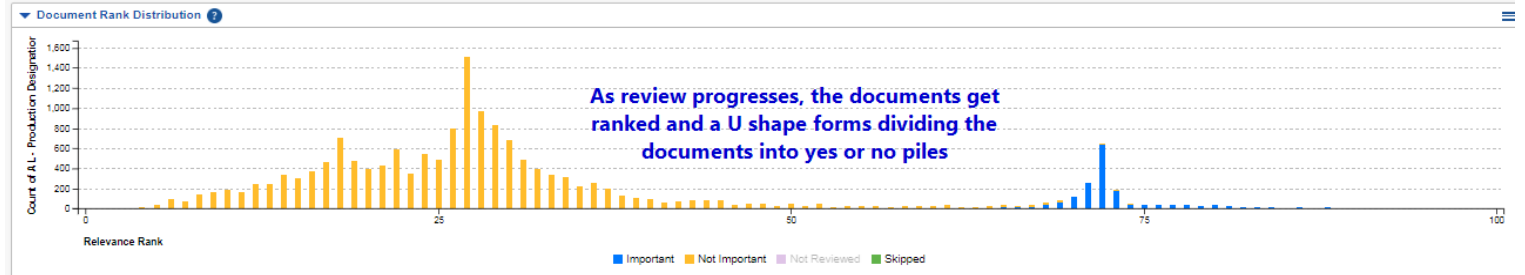
Project Size  
2,278,128 originally  
**2,286,402**

Coded Important  
1,773 manually selected  
**1,773**

Coded Not Important  
15,218 manually selected  
**15,218**

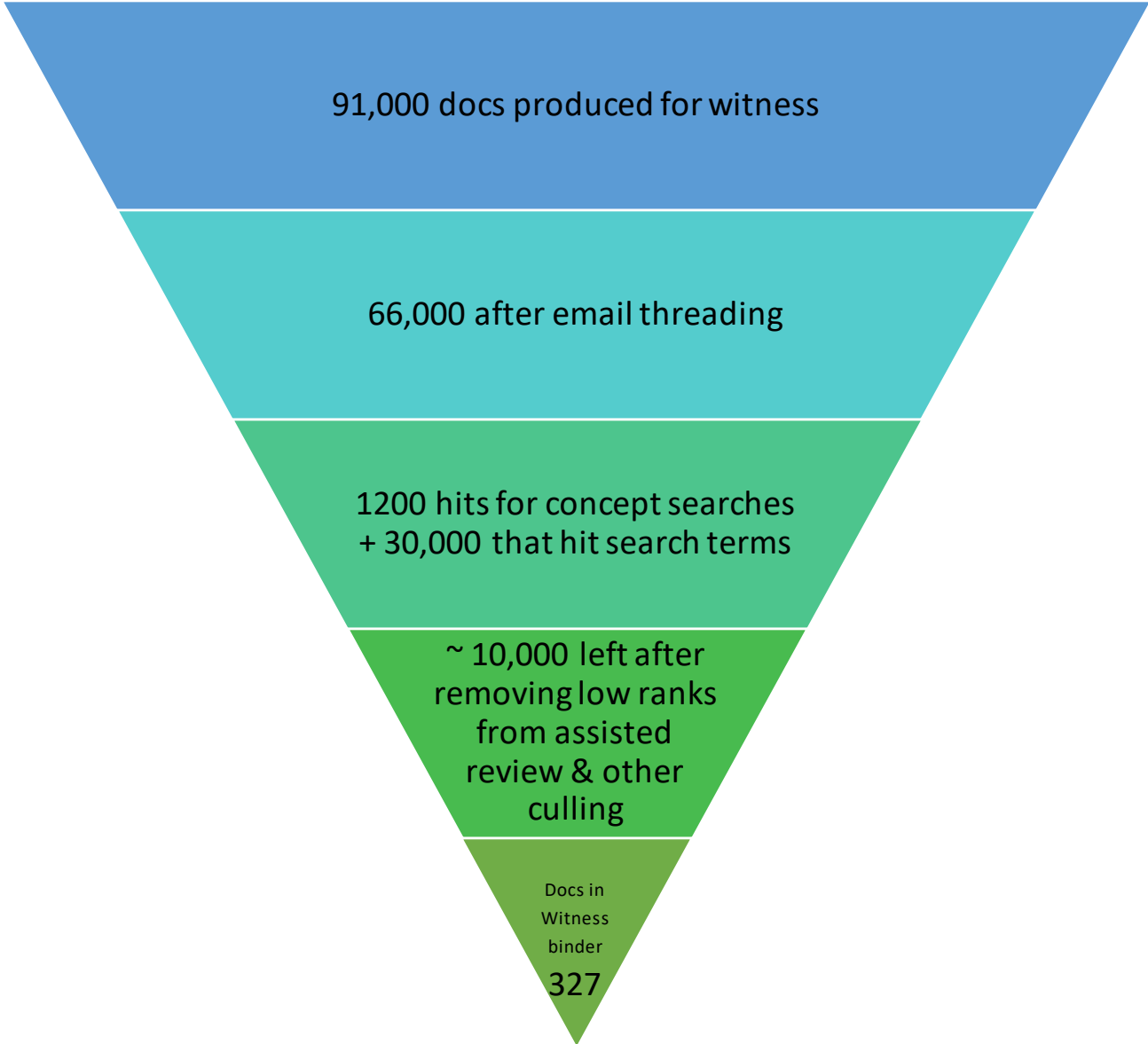
Skipped  
**0**

<b>Prioritized Review</b> Coded: 0 (0 Skipped) Active Reviewers: 0 (Add Reviewers) <a href="#">Start Review</a>	<b>Coverage Review</b> Coded: 0 (0 Skipped) Active Reviewers: 0 (Add Reviewers) <a href="#">Start Review</a>	<b>Elusion Test</b> Docs Remaining: 0 Coded: 0 (0 Skipped) Active Reviewers: 0 (Add Reviewers) <a href="#">Start Review</a>
--	---	---

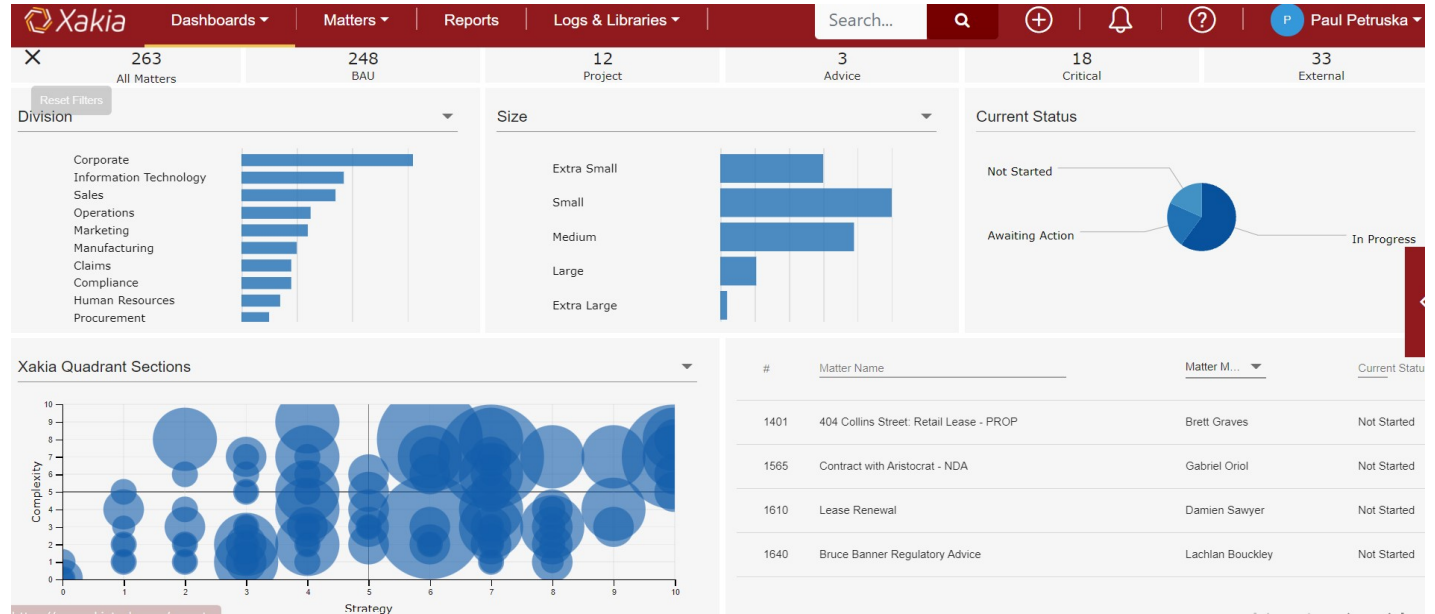


# Witness Preparation Simplified

We culled out 90% of a witness's documents as we prepared for depositions



# XAKIA Software



The 'Matters List' table provides a detailed view of individual matters. It includes a search filter and various action icons (filter, download, print, actions).

No. ↓	Status	Name	Manager	Date Required	Category	Division	Priority
★ 2037	Not Started	NDA with Mickey Mouse r...	Paul Wyatt	10/31/2021	Contract & Comm...	Corporate	Medium
★ 2034	Not Started	Cars 3 Agreement	Ellen Howard	10/26/2021	Business name re...	Claims	Low
★ 2033	In Progress	Dispute with Johnson & T...	Ellen Howard	10/26/2021	Business name re...	Compliance	Low
★ 2032	Not Started	Gremlins 3 NDA	Brandon Spencer	10/26/2021	Contract & Comm...	Corporate	Low



## Comparing Documents



Workshare compare is very helpful

Compare Word document to Word Document

Compare Word document to Final PDF document



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Of Counsel Attorney at Greensfelder,  
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# Questions?



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[https://www.linkedin.com/in/  
julia-voss-22680596/](https://www.linkedin.com/in/julia-voss-22680596/)



**Julia Voss**

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# How to Contact Us



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# THANK YOU



Legal Disclaimer: This document is not intended to give legal advice. It is comprised of general information. Readers facing specific issues should seek the assistance of an attorney.