



Indiana Chapter

March – April 2024 NEWSLETTER

Message from the President

Lisa Becker | Kopka Pinkus Dolin



Dear Indiana Chapter Members,

Here we are almost on the other side of Winter. I don't know about you, but I am ready for some spring showers to make my May

flowers bloom. The next few months will be busier than ever. Some events to mention are Nationals in Denver in May, and Tri-State in June are just a few to mention. Our Chapter is hosting, and we are looking forward to bringing Ohio, Kentucky, and Indiana together. Please look for communications from the chapter to stay up to date. We are always here for any questions.

News from National

- ✓ Read the latest issue of [Legal Management](#). This monthly magazine may be found under Resources at www.alanet.org.
- ✓ Registration is now open for ALA's 2024 Annual Conference & Expo is May 19-22 at the Gaylord Rockies Resort & Convention Center in Auror, Colorado. Take a Peek at the #ALACnf24 Program [here](#).



- ✓ Interested in becoming a Certified Legal Manager (CLM)®? You can learn more [here](#). Ready to take the exam? March 7th is the [deadline](#) to apply.
- ✓ Upcoming LIVE Webinars
AI for Legal Administrators: A Role-Based Guide
March 6, 2024 / \$39 for members - Register [here](#).

Tri-State Educational Retreat + Mini BP Expo

The ALA Indiana Chapter will be hosting the 2024 Tri-State Educational Conference + Mini BP Expo at the Bottleworks Hotel on June 6th and 7th.

The Board is excited to host the 2024 Tri-State Educational Retreat! We hope you will join us for this two-day event that includes Labor & Employment Updates, Workflow Efficiencies, and AI / Phishing Scams and Cyber Insurance.

The cost is \$275 per member and includes a one-night stay at the 4-star Bottleworks Hotel, valet parking, food and access to all sessions and the Thursday evening event at Back 9.



2023 Tri-State Retreat Attendees

Getting the Most Out of Microsoft 365

Submitted by Karen Scher | Affinity Consulting

As technology continues to revolutionize the way we work, law firms are increasingly turning to cloud-based solutions to manage their operations. Microsoft 365, formerly known as Office 365, includes a wide range of tools designed to streamline communication, collaboration, and task management.

Microsoft 365 includes applications like Microsoft Word, Excel, PowerPoint, OneNote, and Outlook, as well as cloud-based services like Microsoft Teams, SharePoint, and OneDrive. Microsoft 365 is designed to help users work more efficiently and effectively by providing them with access to a range of powerful tools that can be used on any device, from anywhere with an internet connection.

Latest Updates to Microsoft Office

With Microsoft 365, your firm gets the latest updates to Microsoft Office. This means that users can take advantage of new tools and improvements as soon as they become available, without having to upgrade to a new version of Office.

Collaboration and Communication with Microsoft Teams

Microsoft Teams lets your firm share files, chat, and even hold video conferences all in one place, making it easy to work together on matters. Collaborate in real-time, regardless of where you and your team members are located. Keep your conversations organized by client, matter, and department using teams and channels.

Task Management with Microsoft To Do and Planner

Microsoft's mobile task manager, To Do, is now included in Outlook. Organize your tasks into lists, delegate quickly, and keep track of what needs to be done next with To Do.

For better collaboration, use Microsoft Planner to assign tasks and keep track of their progress on a drag-and-drop board. See where each matter or task is at a glance.

Scheduling with Bookings

Going back and forth with clients on scheduling a time to meet can be time consuming and annoying. Stop wasting time and send clients a link to schedule directly on your calendar with Microsoft Bookings. You control the hours you are available and whether you need time in between

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appointments. Clients can't see your calendar; they can only see times when you are available. Bookings will automatically put the time on your calendar and send them an invitation.

Cloud Document Storage with One Drive

You can store documents securely in the cloud with Teams or use OneDrive. Teams and OneDrive both make it easy to access documents from any device with an internet connection. Collaborate with others in real time. You can see what they are typing as they type it.

Microsoft 365 Plans

Microsoft 365 is subscription software. Selecting the right plan is key to getting the right features for your firm. You'll need either a business or enterprise plan (don't get a family plan).

The key differences between the plans are whether they include:

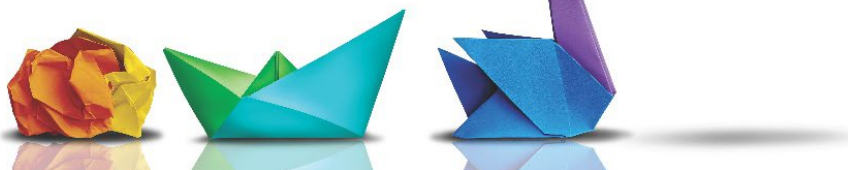
- Exchange (the magic that makes your emails appear on all of your devices)
- Microsoft Office desktop applications
- Bookings (scheduling software)
- Security and device management

If you want Bookings, you'll need an enterprise plan. If you want device management, you'll need an enterprise plan or the Business Premium plan. If you want desktop applications and Exchange, you'll need an enterprise plan, the Business Standard, or the Business Premium plan.

In today's fast-paced world, keeping up with the latest technology is essential for staying ahead of the competition. With the right training, Microsoft Office 365 has the right tools to streamline your communication, collaboration, and task management to help you achieve your goals.

Affinity Consulting works with law firms and legal departments on strategy and technology engagements that help them create a great place to work and deliver excellent services to clients by improving how work gets done, aligning their stakeholders, while focusing on profitability. [Contact us](#) today to learn more about our Microsoft 365 training programs and start transforming the way your firm works.

TRANSFORMING
how your
WORK gets
DONE.



Transform your law firm's digital chaos into streamlined success. Our tech solutions pave the way for more efficient work, a stress-free atmosphere, and **increased profitability.**



SAVE THE DATE

Upcoming Dates and Events

March 13, 2024 - Luck of the Irish Round Tables

Please join us at Lewis Wagner for our 2024 Round Table Discussion. If you have any topics you would like to discuss, please reach out to Marisa Vanek @ marisa@indianahoalaw.com.

April 10, 2024 – Spring Social with the Business Partners

May 19 – 22, 2024 – Annual Conference in Aurora, Colorado

June 6 – 7 – Tri-State Educational Retreat & Mini BP-Expo at the Bottleworks Hotel, Indianapolis

June 12 – Summer Kick-off Social

July 10 – Billing and Accounting

Happy Anniversary!!

Please join the Board in congratulating the following members for reaching membership milestones:

30+ years

Jennifer Ellis, Kightlinger & Gray (33)

20-29 years

Robin Burton, Bose McKinney & Evans (27)

Chris Burch, Taft Law (23)

Debbie Elsbury, Threlkeld Stevenson (21)

Kimberly Frederick,
Scopelitis Garvin Light Hanson & Feary (20)



WELCOME

Our Newest Members

Please join me in welcoming our newest members!

Jordon Cox, Taft Law

Liesel Schmitz, Lewis Wagner, LLP

Linda Wethington, Cohen & Malad, LLP

Member Spotlight

Liesel Schmitz works for Lewis Wagner, LLP in Indianapolis, IN. She has been with Lewis Wagner for almost two years as a legal assistant. Liesel was introduced to the legal field in 2020 when she managed Lewis Wagner's Copy Center. Prior to joining the legal field,



Liesel was heavily involved in the Indianapolis theatre community where she stage-managed/assistant stage-managed several productions at the Phoenix Theatre and Storefront Theatre of Indianapolis. Becoming a legal assistant, allowed Liesel to transfer her management and organizational skills from theatre to a team of attorneys where she strives to provide high quality, detailed oriented work to best support her attorneys and clients. In addition to supporting attorneys, Liesel recently joined the Administration Team at Lewis Wagner, allowing her to utilize her skills in a different capacity to support the firm. Liesel is extremely excited about the additional role at Lewis Wagner and appreciates all the support she has received from the Firm.

Liesel joined the ALA to grow as a young professional new to the law field and as a way to get a better understanding of the ins and outs of administration.

She is excited to become more involved with ALA this year and meet everyone in the chapter.

Outside of the office, Liesel enjoys spending trying new restaurants around Indianapolis, traveling, and you'll find her in the BYB Supporter Section at all the Indy Eleven home soccer games. Some of Liesel's favorite travel experiences are visiting Pompeii and hiking Mount Vesuvius in Italy, and all the museums Washington D.C. has to offer. And her favorite Indy restaurants include, Union 50, Tavern on the Point, and The Tap.



Celebrating 50 years!

The Indiana Chapter is celebrating 50 years of participating in the advancement of the legal profession. J. Manfred Core was the first chapter president from 1974 – 1975.

Enjoy a few photos from past Chapter events!



A Quick AI Primer for Law Firms

Tino Marquez , Partner | Modern Information Solutions, LLC

With all the hype around AI, how do we narrow down our focus to exploring tools that may actually be useful to our firm? We are bombarded with all the wonders and groundbreaking achievements that this technology is bringing to the table on what seems to be a daily basis. We know that several of our tools are now integrating generative AI into their design to assist us in our tasks from Adobe Acrobat to Lexis Nexis. But what are some other ways we can harness AI directly in our day-to-day tasks and directly see the results? When tasked with the proposition from an executive committee to find a way to adopt AI to make the firm more efficient, it can become daunting quickly. Unfortunately, AI is not some kind of magic wand that is going to make your life easier without any effort on your part. You're going to have to invest time learning the various tools and how to best interact with them to get the best results.

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ChatGPT

By now you have probably heard of ChatGPT, and maybe dabbled using it and learning how to use different prompts. Powerful, sure, but maybe unlikely that attorneys and staff would ever need or want to go to chat.openai.com to use the ChatGPT interface directly. I believe that attorneys and staff will instead be more efficient in using applications that have “hooks” into ChatGPT. For those who enjoy tinkering, attorneys and staff can go to chat.openai.com and ask questions in the web interface. No need to reinvent the wheel here, the good folks at [Clio](#) put together a good read introducing ChatGPT along with some prompts lawyers may use: [6 ChatGPT Prompts for Lawyers](#).

Ghostwriter Legal

Ghostwriter OpenAI is a ChatGPT add-in for Microsoft Office. Basically, it is a writing assistant. It can be purchased and added from the Microsoft Add-In store. You can purchase individual components (ex. Excel, Outlook, PowerPoint, Word) or the entire **Office Bundle**. For Microsoft Word, they have what they call “Profession Add-Ins” that are focused on specific professions such as legal. Ghostwriter Legal is **\$200.00** per license (user).

Ghostwriter Legal is a game-changer for legal professionals, streamlining their workflow by providing unparalleled AI-powered assistance in drafting documents, researching case law, and summarizing complex information. This cutting-edge add-in not only saves valuable time and resources but also elevates the quality of legal work, ensuring that attorneys and law firms stay ahead in the competitive legal landscape.

You can watch the Ghostwriter Legal promotional video here: [Ghostwriter Legal- The only Microsoft Word add-in that is crafted specifically for Law Professionals - YouTube](#)

Microsoft Copilot

Microsoft has its own AI drive tools built on the same AI technology that ChatGPT is based on, and it is called Microsoft Copilot. In a nutshell, Microsoft Copilot is an AI service that assists users at every stage in Microsoft 365 with “repetitive” tasks such as writing documents, summarizing, composing emails, and preparing demonstrations. Whereas Ghostwriter Legal is more of a writing assistant, Microsoft CoPilot, as the name would imply, is a personal assistant tying into the most used Microsoft 365 applications.

Unfortunately, it is a separate service, and it is not a “free” add-on to your current Microsoft 365 subscription. The cost of the service is **\$30 per user per month** and requires an annual commitment. You can work with your internal IT team or IT partner to get a 30-day trial version so that you can become more familiar with its features.

Instead of more marketing materials directly from Microsoft, I recommend checking out this lengthy video that shows you what using Microsoft Copilot in your various 365 Applications looks like: [A beginner's guide to Microsoft 365 Copilot \(youtube.com\)](#)

About Sponsor of Article



Tino Marquez (tino.marquez@mislegaltech.com) is a co-owner of the Indianapolis based legal technology company, Modern Information Solutions, LLC. Areas of service include legal IT helpdesk, software training and litigation support.

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DIVERSITY DISCUSSION

Submitted by Shalon Roberson | Krieg DeVault LLP

DIVERSITY, EQUITY AND INCLUSION FREQUENTLY ASKED QUESTIONS

What is Diversity, Equity and Inclusion (DEI)?

Diversity, equity and inclusion is a term used to describe policies and programs that promote the representation and participation of different groups of individuals. DEI encompasses people of different ages, races, ethnicities, abilities, disabilities, genders, religions, cultures and sexual orientations. It also covers people with diverse backgrounds, experiences, skills and expertise.

Diversity, equity and inclusion are three different but interconnected concepts. They work together to create an environment of respect and fairness. It involves initiatives promoting the equal access, opportunity, employment and sense of belonging of underrepresented people in the workplace.

DEI plays an important part in promoting an inclusive workplace culture and ensuring an effective recruiting and hiring process. It aims to achieve these goals by overcoming unconscious biases, which are stereotypes about other people formed outside a person's awareness, and identifying and mitigating microaggressions, which are negative behaviors toward individuals based on those biases.

Diversity?

Diversity involves all the ways that people are different, including the various characteristics that distinguish one demographic or individual from another.

Diversity often refers to including demographics that aren't broadly represented in society or certain industries.

Elements of **diversity** include:

- Race.
- Ethnicity.
- Sexual orientation.
- Socioeconomic status.
- Gender identity.

Equity?

Equity aims to ensure equal treatment, access, opportunity and advancement for people, including employees in the workplace.

Equity attempts to identify and remove barriers that prevent some groups from fully participating in society or certain jobs and industries.

To promote **equity**, people often focus on understanding the causes that underlie disparities in society.

The aim of **equity** is to promote justice, fairness and impartiality in the way things are done and in the

Inclusion?

Inclusion builds a culture where everyone feels welcome. It actively invites every person and group to contribute and participate.

An **inclusive**, welcoming environment supports and embraces differences. Participants offer respect to everyone in words and actions.

A work environment that's **inclusive** is supportive, respectful and collaborative, and encourages all employees to participate and contribute.

- Religion.
- Language.
- Age.
- Marital status.
- Veteran status.
- Mental ability.
- Physical abilities and disabilities.

Diversity also includes the range of ideas, perspectives and values people have.

distribution of resources within social structures, systems and institutions.

Equity efforts exist in the workplace, the justice system, schools and other institutions.

Organizations with inclusive work environments should eliminate barriers, discrimination and intolerance, and aim to build a workplace in which employees feel they belong and are supported by equitable procedures and socially aware human resources (HR) departments.

2024 – 2025 Board of Directors



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