
THE PRACTICE MANAGER

A NEWSLETTER PROVIDED BY THE LAW OFFICE MANAGEMENT PROGRAM OF THE STATE BAR OF TEXAS
WEEK OF February 7, 2005

WE HAVE MOVED: VISIT US AT OUR NEW WEBSITE – www.TexasBarLOM.com

Law Office Management Update

Orlando Lopez

We have received numerous comments regarding this newsletter since we've gone statewide with it a few months ago. The responses have been very positive and we want to let our members know that we really do appreciate each and every single comment that we receive and we hope that you continue to give us your feedback.

Next month, we will be introducing a new column that will deal solely with technology issues. Gerry Morris, an Austin attorney specializing in criminal law, will author this new column. Mr. Morris is a frequent speaker in the legal community and his hobby just happens to be technology! As with the *Coach's Corner*, the technology column will be a vehicle to get your questions answered. Simply email the authors and check future articles for the answers.

With the addition of this new column, our regular *Law Office Management Update* will have to be scaled back due to space limitations so don't be alarmed to see a condensed version of the update next month. Until then, enjoy the rest of the newsletter and don't stop sending in your comments.

INSIDE THIS ISSUE

- 1 Law Office Management Update
- 1 The Coach's Corner
- 2 Leadership – Paving the Way to Be a Situational Leader
- 4 Management Tip
- 4 Upcoming Events
- 4 Law Office Management Special Offers

The Coach's Corner

Debra Bruce, JD, PCC

10 Tips for Surviving the Email Avalanche



Are you buried under an avalanche of email? Do you lose important information hiding among the emails clogging your inbox? Here are 10 tips for digging out of the email avalanche. These tips reference features available in Outlook, but most email programs have similar features.

Use automated features to sort your emails into folders as they arrive. The Outlook Rules Wizard (under Tools) will let you create rules for automated sorting of incoming emails by sender, subject, text and other filters. Incoming messages are routed to the designated folders, which change to bold print to indicate an unread message. Set up folders (select File, New, Folder) for your clients so that you can see at a glance that you have email from them, and keep all your correspondence together. Replies to an email in that folder automatically will be stored in that folder as well. You can also route newsletters, listservs and other high volume, low priority emails to special folders to keep them from clogging your inbox until you have time to read them.

Drag and drop emails to your task icon if they have "to-do" items associated with them. The task will be included in the task list, and a copy of the email will be visible in the details window for the task. You can set a due date and reminder for the task. Delete the email or move it to a storage folder. You will get a pop-up reminder at the designated reminder time, even if you have deleted the original email. If the task is not marked as complete by the due date, it will turn red in the task list as a further reminder.

Drag and drop emails to the calendar icon if they involve events to schedule. That will open the scheduler window and you can also associate the appointment with the appropriate contacts so that it will show up in their Outlook contact files. The subject line of the email will be reflected as the appointment description, unless you change it. A copy of the email will appear in the details of the appointment. Move the email out of your inbox to an appropriate folder, or delete it.

Create folders for different actions to be done with respect to

See *Coach's Corner* on page 3

Leadership – Paving the Way to Be a Situational Leader

Nickie Freedman, PHR

A successful leader is flexible and should be able to use four different styles of leadership: *directing*, *coaching*, *supporting*, and *delegating*. The type of style used depends on the situation and the subordinate's ability to carry out the task assigned, as well as the competence and commitment.

Now, how does that pertain to the four types of leadership styles described above? Suppose the managing partner (you) are having a meeting with an associate to arrange for a mediation in a case. What would you do? Well, it depends on the type of leadership style you use.

A *directing* partner would tell the associate to contact the mediator, opposing attorneys, confirm the date, and what type of documents to draft. When that's done, he reports back to you.

A *supporting* leader would ask the associate who they thought would be best to attend the mediation, possible defenses, and what types of documents to draft, but the partner would ultimately make the decision.

A *coaching* partner would combine both direction and support: suggest to the associate the possible defenses you're thinking of, and ask for questions or suggestions regarding that. You're trying to provide a lot of support because some of the ideas suggested are good and you want to reinforce initiative and risk-taking – teach people how to evaluate their own work. However, the ultimate decision rests with you.

A *delegating* partner would simply turn over the responsibility of the decision-making and problem-solving to the associate.

Is there a best way to figure out which style to use? Yes, there is, and it depends on the experience of the subordinate, plus his commitment to the job.

For instance, Ms. Jones is a new associate in the firm. When people are first learning a job, they're usually enthusiastic beginners – they're ready for any help you can give them because they want to perform well. Therefore, you would use the *directing* style. This gives inexperienced people the potential to be self-directive in the future.

However, what if the associate is in her 4th year but feels that good performance goes unrecognized and has become disillusioned or lost interest? Then the best style is *coaching*, which is high on direction and support.

What if the associate is experienced and competent on his assignment, but is a reluctant contributor (i.e., has ideas but not much faith in them) and wants to test out ideas with you before taking action? Then the *supporting* style might work best.

Now what if the associate is a peak performer (i.e., she's

competent and committed)? Then you would use the *delegating* style and let her take care of the mediation in the best way she sees fit.

But what does this mean for those in the trenches and not in a 'leadership' role? Basically, it means everything! Let's think about that for a moment. What is a 'leadership role'? Well, if you ever tried to influence the performance of someone else (and who hasn't?), you've been in a leadership role. You don't need to be a managing partner or even a senior associate. You can use these styles of leadership to fit into your daily life.

Do you have children? If so, you probably use these styles all the time but just don't realize it. When your children are young, you use the *directing* style until you feel they're mature enough to handle situations. At that point, you flow into the *supporting* style until they feel more confident in their own abilities. You then automatically move into *coaching* to teach them to be self-sufficient. By the time they're young adults, you're then *delegating* tasks to them without giving it a second thought. In other words, you've observed them at various stages and know when they can handle certain situations. You've given them the confidence to be leaders by teaching them how to make their own decisions and become leaders on their own.

In much the same way, we can groom our future leaders by using the four styles described above. New associates should be shown how the job is done with the *directing* style. Once they're done the task a few times and are comfortable, we can move into the *supporting*, then *coaching* style. Once we and they are confident in their abilities, we move into *delegating* the tasks and assignments. Before you know it, they're then teaching younger associates to be the leaders themselves. In this way, the firm can grow and renew itself into the future.

Nickie Freedman, PHR, owns Legally Large, a training and consulting firm specializing in procedural, administrative, and professional training for legal support staff. She can be reached at Nickie@LegallyLarge.com.

different emails. Drag and drop messages to one or more folders you create, such as “Needs Response,” “Take Action,” “Read Today,” “Read Later,” “Read Maybe,” “Decide,” “Follow Up,” “Delete in 30 Days,” or whatever fits your style. Use the folders to help you prioritize your email activity and get them out of your inbox. Cause the folders to appear at the top of the folder list and in the preferred order by starting the folder name with a number.

Flag emails as a reminder of action to take. For really important and urgent items, you can use the flag feature of Outlook and set a time for an alert. Right click on the email, and choose “Flag for Follow Up.” In the “Flag to” drop down list you can choose the kind of activity you want to be reminded to do, and in the “Due by” drop down list you can choose a calendar date and time. If the due date and time passes, the email will turn red to further draw your attention to it. Unfortunately, you must leave such flagged items in the inbox for the alert feature to work, so limit its use to truly important and urgent items. Warning! Using this method may undermine the effectiveness of the folders described in #4 above, as their contents may become “out of sight, out of mind” if you rely too heavily on flags.

Move emails into the appropriate folder for storage before responding. Your reply email automatically will be stored in the same folder. Save yourself the trouble of finding the sent email and moving it for your records. You will be able to look in the folder to identify all the related correspondence activity later.

Use a “Delete in 30 Days” folder. Don’t leave an email you have already read in your inbox unless you have flagged it for action. If you are afraid to throw it away right now, in case you might need the information later, put it in the “Delete in 30 Days” folder. That’s a good place for notices about those seminars and offers with an expiration date that you *might* want to follow up on. You’ll know where to find them if you need them, and they won’t obscure your view of important items in your inbox.

Get a good spam filter. Personally, I love SafetyBar (formerly SpamNet) by Cloudmark. I especially love that it gives me something effective that I can do each time I receive a spam email. I can click on the “Block Spam” button and that immediately sends a message to Cloudmark that I believe this item is spam. As other subscribers do the same thing, Cloudmark’s filter quickly learns which emails are spam, and routes them to the spam box for future recipients.

Use the drafts feature and the signature feature to create templates for common responses to save time. To save a draft to use as a template, just create a message in a new window without a recipient, then click on the save icon, or select File, Save As. Name the template in the subject line. Later you can open the Drafts folder, find the draft message and copy and paste the contents into your new email. Close the draft to save it again. To create a template using the signature feature, select Tools, Options, Mail Format, Signature Picker, New and then follow the instructions. Give your signature a name that identifies the template. To insert the template into an email, select Insert, Signature, and the name of the template you created.

Have your assistant cull your email before you view it. Many

The Practice Manager is a newsletter published by the Law Office Management Program of the State Bar of Texas. Please direct any questions or comments to Orlando Lopez at 800-204-2222, ext. 1302 or at olopez@texasbar.com

The Law Office Management Program of the State Bar of Texas

*Gisela B. Bradley, Director – 800-204-2222, ext. 1301
or gbradley@texasbar.com*

*Orlando Lopez, Project Manager – 800-204-2222, ext. 1302 or
olopez@texasbar.com*

*Sandra Molina, Administrative Assistant –
800-204-2222, ext. 1304 or semolina@texasbar.com*

*Tina Weitz, Seminar/Program Assistant – 800-204-2222, ext 1303
or tweitz@texasbar.com*

**PLEASE NOTE THAT ALL
TEXT IN “RED” OR “BLUE” FONT ARE ACTIVE
WEBLINKS
SIMPLY CLICK ON THE COLORED-TEXT TO BE TAKEN
TO CORRESPONDING PAGE**

**Law Office Management Program
State Bar of Texas
1414 Colorado, Suite 601
Austin, Texas 78701
800-204-2222, ext. 1300
www.TexasBarLOM.com**

assistants already open postal mail, so why not email, too? You can have your assistant delete spam (or route it to a spam folder for your deletion) and categorize your email for you in advance of your review. Give out a different email address for personal email that your assistant does not handle, if privacy is a concern. You can even have your assistant draft responses or respond for you to commonly occurring inquiries.

Debra Bruce (www.DebraBruce.com) practiced law for 18 years, before becoming a professionally trained Executive Coach for lawyers. She is a member of the Law Office Management Committee of the State Bar and Co-Leader of the Houston chapter of the International Coach Federation.

Upcoming Events

Law Office Management Institute – Managing Your Criminal Law Practice is scheduled for video replay in San Antonio on February 16, 2005. This seminar has been approved for 5.75 MCLE hours, including .75 in ethics. For more information, visit: <http://www.texasbarcle.com/CLE/LMEventsMI.asp>

How to Organize and Manage Your Immigration Practice is scheduled live February 23, 2005 in Houston. This seminar has been approved for 3.0 MCLE hours. To register, call 800-204-2222, ext. 1574
<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=4932>

Law Office Management Institute – Managing Your Consumer Bankruptcy Practice is scheduled for video replay in Houston on February 23, 2005 and Austin on February 25, 2005. This seminar has been approved for 5.75 MCLE hours. For more information, visit:
<http://www.texasbarcle.com/CLE/LMEventsMI.asp>

How to Organize and Manage Your Intellectual Property Practice is scheduled live March 9, 2005 in Austin. This seminar has been approved for 3.0 MCLE hours. To register, call 800-204-2222, ext. 1574.
<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=4918>

Law Office Management Institute – Managing Your Legal Department is scheduled for video replay in Austin on March 11 2005, March 23, 2005 in San Antonio and Houston on March 30, 2005. This seminar has been approved for 3.0 MCLE hours. For more information, visit:
<http://www.texasbarcle.com/CLE/LMEventsMI.asp>

How to Organize and Manage Your Elder Law Practice is scheduled live April 13, 2005 in Houston. This seminar has been approved for 3.0 MCLE hours. To register, call 800-204-2222, ext. 1574.
<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=5130>

Law Office Management Institute – Managing Your Family Law Practice is scheduled for video replay in San Antonio on April 20, 2005. This seminar has been approved for 4.75 MCLE hours. For more information, visit:
<http://www.texasbarcle.com/CLE/LMEventsMI.asp>

Law Office Management Institute – Managing Your Estate Planning and Probate Practice is scheduled for video replay in Austin on April 22, 2005. This seminar has been approved for 6.5 MCLE hours. For more information, visit:
<http://www.texasbarcle.com/CLE/LMEventsMI.asp>

Law Office Management Special Offers

Books of the Month

The Lawyer's Guide to Fact Finding on the Internet
Retail - \$79.95
Sale Price - \$55.95

This unique resource will help you select relevant research sources; access subject guides, newsgroups, and listserves; find experts on the Web; get news on the Web; research companies, public records, and backgrounds; use the Web for competitive intelligence; conduct medical, statistical, international research; and more!

***Results-Oriented Financial Management:
A Step-by-Step Guide to Law Firm Profitability***
Retail - \$99.95
Sale Price – \$69.95

This book is ideal for any law firm looking to improve its financial management system and ultimately achieve better profitability. CPA and law firm financial expert John Iezzi guides you through the entire financial management process, from gathering a firm's historical personnel and billing data to preparing and analyzing the budget itself..

**TO ORDER EITHER OF THESE PUBLICATIONS,
CALL 800-204-2222, EXT. 1300**

Law Office Management Tip

All management tips are provided by State Bar of Texas and ABA Practice Management Advisors. The tips are not meant as legal advice, nor binding on the State Bar of Texas or the ABA.

Did you know that newsletters play a tremendous marketing role in many law firms? A good newsletter starts with a good marketing plan. A marketing plan will help guide your ideas, so that you can market yourself and your services to clients. Here are a few tips that you can use as a guide in creating your newsletter.

1. Setting goals.
2. Setting objectives.
3. Finding a well-defined audience.
4. Matching your goals and objectives to target markets and forming an action plan.
5. Keep in mind that a successful newsletter should always show the publication's goals and connect with the readers' interests.
6. Develop a plan that will express what your firm can offer clients.