
THE PRACTICE MANAGER

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The Technology Roundup

Gerry Morris, J.D.



Palm's New Treo 700w

This month I want to talk about a new product recently made available through Verizon Wireless, the Palm Treo 700w. The new Treo utilizes Microsoft's Windows Mobile operating system. This marks the first time Palm has departed from its own operating system and partnered up with Microsoft.

I've made it clear in my past columns that I think the Treo 650 is by far the best smartphone for the way lawyers do business. Its closest competition, RIM's Blackberry line, doesn't yet offer the versatility of the Treo because of the latter's ability to run the thousand's of available Palm (and now Microsoft) applications. Recently, Blackberry's patent fight has made its future unclear. The only criticism consistently lodged against the Treo was from those that prefer the Microsoft Windows Mobile operating system.

I have not personally used a Treo 700w but the available

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The Coach's Corner

Debra Bruce, J.D.



Don't Wait to Read This

I procrastinated in writing this column. Many wise people have said that we teach what we need to learn, so overcoming procrastination is the topic for this month. Let's start with why we procrastinate. Here are some common reasons:

- It involves an unpleasant task.
- We don't know or are unsure about how to do it.
- We know how, but it's difficult.
- The task involves a tough decision.
- We don't have all the materials or information we need.
- The project is too big and overwhelming.
- We underestimate the time required and have a lot to do.

What do we do to get past procrastination? In my coaching I find there are very few one-size-fits-all solutions. There are patterns and tendencies, however, so we experiment, and we understand that what worked yesterday may not work with a different project today. Here are some tips for your experimentation:

Swallow the big frog first. Pick out the ugliest, hairiest, stinkiest job on your list, and tackle it first. Get it over with and everything else today will be easy. If you have the discipline to do this with regularity, you are probably not a true dyed-in-the-wool procrastinator. Perhaps you should lighten up on yourself. Most of us apply this technique in crisis situations when procrastination has piled up a lot of must-do tasks.

Build momentum with small tasks. The opposite technique involves attacking a few tasks that can be completed quickly to give you a sense of success and build momentum. Once you're on a roll, you can get a lot done.

Create bite-sized chunks. Break those huge overwhelming projects into smaller bite-sized chunks. Identify the next action step for each chunk. This also works for those projects we aren't sure how to accomplish. Often we can identify the first action steps, and once

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information from Palm and Verizon indicates that it has all the functionality of the 650. Installed applications include the familiar email, calendar, tasks and contacts application that sync with Microsoft Outlook. The email application can be configured to retrieve mail from a POP account via the Internet. Applications are included to allow the user to compose and edit documents from Microsoft Office applications including Word, Powerpoint and Excel.

The basic device is very similar in its particulars to the Treo 650 but with some improvements. One welcomed improvement is the increase in built-in memory from approximately 24 meg on the 650 to 128 meg on the 700w. The built in memory on the 650 fills up pretty fast if you have a lot of applications or want to store documents, pictures or videos there. Both models accept SD card memory for data storage or applications to expand usable memory. I have a 1 gig card in mine and use it to store Word documents, photos and audio files. You might get by without one with the 700w.

Another feature that has been improved over the Treo 650 is the 700w's built in camera. The Treo 700w includes a 1.3 megapixel camera in contrast to the .3 megapixel one included in the 650. I view the camera in my 650 as more of a novelty than a tool. The pictures are fair under good conditions but nothing to write home about. The camera in the 700w might be much better. I debated whether to purchase the 650 model without the camera so that I wouldn't have to check my phone with security when entering a federal courthouse. Every time I leave it with the guards and go to court with a hard copy printout of my calendar rather than the electronic one I question whether I made the right decision. A 1.3 megapixel camera may be more worth the hassle.

Otherwise the main differences in the 650 and the 700w are those between the functionality of the Palm apps and the Microsoft compatible apps. If your mail system utilizes Microsoft Exchange Server, there's an upgrade that allows for email to be pushed to your device, which basically means that you get it as soon as it arrives on the server rather than waiting for your phone to connect and check the server for email. Also, the Mobile Outlook app is a bit more feature rich than the comparable program group in the 650. Some of the new features incorporated in the software of the 700w are available as add-ons for the 650 from third party vendors. For instance, see <http://www.ludustech.com/>.

The Treo 700w includes Bluetooth capabilities for use with wireless headsets and carkits. Check the Palm website, it doesn't appear that a keyboard is currently available, but I would expect one soon.

Verizon Wireless is currently the only service provider offering the Treo 700w. For more information about the Treo 700w, and available service plans, try <http://vzwshop.com/treo700w/>. Other service providers should offer the 700w by mid year. Also, CNET provides a good review of the 700w at http://reviews.cnet.com/Palm_Treo_700w/4505-6452_7-31473222.html. Also, here's the link to my original article

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about how I use the Treo in my practice. http://www.texasbarcle.com/CLE/site/LawOfficeMgmtNewsletters/05_03_07.pdf

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Kickstart To a More Productive Staff (Part II of III)

Nickie Freedman

In Part I of this series, we discussed creating a high performing staff and what it entails – building an atmosphere of employee empowerment. And what constitutes employee empowerment? I believe it comes down to three basic principles:

Encourage an Ownership Attitude (*featured in Part I*)
Coaching Management Style
Freedom to Fail

This installment is about kickstarting coaching as the firm's management style.

Coaching Management Style

In a previous article for the Practice Manager (February 7, 2005), I talked about the four different leadership styles, one of which was *Coaching*.

What is the coaching management style? This style entails a lot of direction and support. It encourages staff to play a more active role in their work, involves them in taking responsibility for improving processes and culture, and trusting them to do their jobs well.

Many attorneys and administrators may feel that they're already coaching staff and I'm sure many are. However, the majority of staff I meet in training sessions complain of either micromanagement or never knowing what's going on.

How to explain this difference of opinion between the two groups? The adage that 'perception is reality' is probably at work here. While many administrators believe they use the coaching style (and in fact, may be using it), staff perception is what truly matters. Is everyone in a supervisory/management position on the same page regarding management style or does that only pertain to the firm's administrator? What I find many times is just that situation – the firm's administrator does use coaching; however, the attorney(s) that person supports probably does not.

What can be done about this dichotomy? I'll be honest about it – some people will never change; however, I do believe that most people can and will if given proper incentive and guidance. I've actually seen it happen when the right person is placed with an attorney and is given the tools and time to work out the other person's insecurities in trusting others to do the job well.

Kickstart The Attorney/Assistant Relationship

So how do we kickstart this process? I'm a firm believer in

getting the parties together and working out an attorney/assistant agreement. This doesn't have to be an overly involved or formal signed process. It simply sets out the attorney expectations for their assistant and what the assistant expects from the attorney, and gives them a place to start in building their working relationship.

A *partial* list I used when starting a new assignment:

What are your expectations of me?
What is your working style?
What behaviors bother you?
How do you wish to be told of incoming calls?
Are you comfortable transferring nonbillable work to me so you'll have more time for clients and billable work?
What is your description of a capable, effective, and indispensable assistant?

This is how I prefer to be corrected if you're unhappy with my work: Please tell me as soon as possible and not wait until my evaluation (which may be six months away). I do not take criticism personally. My role is to assist you in your practice and free your time for clients.

I would then answer those same questions myself and let them know what worked best for me. Did this work to instill trust in me from my supervisors? With one notable exception, it did. Is this the only tool needed for supervisors to learn to use the coaching style? No, it isn't. However, it is a good way to kickstart the process.

What's the last critical part of empowering staff? We'll discuss that in Part III of this series.

Nickie Freedman, PHR, owns Legally Large, a training and consulting firm specializing in the BUSINESS of practicing law. To receive her "Work Smarter" tips, contact her via www.LegallyLarge.com, Nickie@LegallyLarge.com or directly at 512.791.9644.

we accomplish them, we can see the next step more clearly.

Ask for help. Why do we think we have to do everything ourselves? Are we reinventing the wheel? What a waste of time! Go back to the source of the assignment, go to a colleague, go to the library or the Internet. Ask for help, information, guidance or examples. Once you have help, the task won't be so daunting and you can get moving.

Team up with someone. This is a corollary to the previous tip. Literally ask for teamwork in doing the job or trade off with someone. Misery loves company and two heads are better than one. When I was 12 and had to clean my room, I teamed up with a friend down the street. First we cleaned her room, then we cleaned mine. We kept each other moving, got it over with, and enjoyed the company enough to make the time fly.

Find a way to make it fun. Be as smart as a 12 year old. Do it with a friend, do it outside, do it with your favorite music on, or wear jeans to work to do it. Get creative. You won't put off reading that 70 page Asset Purchase Agreement if it gives you an excuse to sit at a picnic table in the park on a pretty day.

Do it for 15 minutes. This is another way of creating bite-sized chunks. Sometimes we just can't stomach doing the whole project, but we can muster up enough discipline to work on it for just 15 minutes. In four such episodes we can dispense with an hour long distasteful task. Sometimes once we get 15 minutes into it, the momentum will carry us through to completion in one sitting. Maybe it won't be as bad as we thought.

Calendar it. We are much more likely to do those things we have set aside a specific time for. We don't wait until we get a "round tuit."

Plot backward. If we have a deadline, sometimes we don't get started soon enough to do a quality job. Before calendaring it, we need to think it through and estimate the time required. Most of us then need to double that time estimate. Even if we didn't underestimated the time required, did we allow for interruptions, equipment failures and emergencies? To decide when we need to get started, we also need to plot the other tasks to be accomplished in the same time frame. We may find we have less time available than we thought.

Promise yourself a reward. If we never celebrate our accomplishments, they just amount to preparation for the next job. No wonder we lose motivation and procrastinate! Maybe you get to take a 15 minute break and go downstairs for a snack when you get those answers to interrogatories completed. If it's a big project, plan a big reward, like a day off, a shopping spree or a weekend getaway. During an average day, when you finish something you hate doing, let the next project be something you love to do. Have you noticed how much more efficient you get at the end of the day when you know you can go home as soon as you finish what you are working on?

Create a negative consequence. Sometimes we are more motivated by the whip than the carrot. I once shared a goal with my coach, but then put it off for 3 weeks in a row. She verified

that I really did want to accomplish that, and that there were benefits to doing it. She asked me to sincerely commit to doing it this week. I did. Then she said, "If you don't do it this week, you'll send me your watch." I gasped. My watch! I didn't dare ask if she intended to keep it. I had just committed to do the task. If I was in integrity with her, that would be irrelevant. Even if she ultimately returned my watch, it would be a strain to manage without it. That week I *scurried* to get the task done before the next coaching call.

Get an accountability partner. As described above, this is where a coach really comes in handy, but a friend who isn't afraid to hold your feet to the fire will work, too. Almost every week a client tells me, "I got it finished this morning because I knew I would have to talk to you about it this afternoon."

Delegate it. If you keep procrastinating on the same kinds of tasks, most likely they require skills that are not your strong points. You'll be more productive, *and your clients will be better served*, if you devote your time to doing what you do best. Believe it or not, someone actually enjoys doing what you consider grunge work.

Strike it off your list. If you have something on your list that keeps revolving to the next week and the next month and the next, perhaps it is time to get honest with yourself. However beneficial it might be, you don't want to do it. Unless there are dire consequences, just take it off your list and get back into integrity with yourself and anyone else involved. Looking at that undone item every week is lowering your self-esteem, draining your energy, and affecting the quality of your work elsewhere. Fahgeddaboutit.

Good luck with getting into action. If having someone check up on you will help, email me your goal, and I'll check back with you in a week.

Debra Bruce (www.lawyer-coach.com) practiced law for 18 years, before becoming a professionally trained Executive Coach for lawyers. She is a member of the Law Practice Management Committee of the State Bar of Texas, and the co-founder of Houston Coaching Network, the Houston Chapter of the International Coach Federation.

Law Practice Management Tip

This week's tip is provided by Paul Murrillo of Business Software Made Easy (512-451-9720). The tips are not meant as legal advice, nor binding on the State Bar of Texas.

If you use Internet Explorer for your surfing, you may have noticed that it saves information like your name, address, email address, etc. then readily offers it up when you are completing an on-line order form, application, or whatever - very handy except when it keeps presenting the wrong information!

If this is happening to you, this is how you can clear it out:

In Internet Explorer:

1. Tools > Internet Options...
 - The Internet Options window appears
 2. Click the 'Content' tab
 3. Click the 'AutoComplete...' button
 - The AutoComplete settings window appears
 4. Click the 'Clear Forms' button
 5. Click OK
 6. Click Apply
 7. Click OK (again)
- That's it!

While you are in the AutoComplete window you can also:

- Turn on/off the AutoComplete for Web Addresses
- Turn on/off the AutoComplete for Form
- Turn on/off just the AutoComplete Passwords
- Turn on/off a prompt to save for Passwords

Law Practice Management Update

Our first webcast, Finding and Keeping Good Clients, was a huge success and seemed to be relatively glitch free! Needless to say, we were very impressed with the technology and truly feel that soon, this will be the vehicle of choice for most Texas attorneys in fulfilling their CLE requirements. If you have not already done so, sneak a peek at the Upcoming Events section to your right to see what we have in store for future webcasts!

As more and more attorneys take advantage of online courses such as live webcasts, don't forget that Law Practice Management also has a library of online video classes that one can access 24-hours a day, seven days a week. Simply visit www.TexasBarLPM.com and click on "Online Classes," located in the right-hand column. There are a number of online practice management classes to choose from and we are continually adding to that list so check back regularly.

Law Practice Management Special Offers

Books of the Month

Making Partner – A Guide for Law Firm Associates

Retail - \$49.95

Sale Price - \$34.95

Becoming a partner in a law firm is a career goal of many lawyers - an upper rung on the ladder of success. Now you no longer have to rely only on observation and gut instinct to take those next steps up. Turn to *Making Partner* to give you the guidance you need to get ahead in your firm!

The ABA Guide to Professional Managers in the Law Office

Retail - \$79.95

Sale Price – \$48.95

Hiring professional managers to handle administration of your law firm frees up your attorneys to do what they do best – practice law and develop new client relationships. And it provides you with the leadership of a competent professional specifically trained to provide top-notch management services. *The ABA Guide to Professional Managers in the Law Office* is a "soup to nuts" guide on interviewing, hiring and training this essential member of your firm.

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How to Organize and Manage Your Litigation Practice is scheduled for video replay in Dallas on March 1, 2006. To register, call 800-204-2222, ext. 1574 or visit - <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=5595>

How to Organize and Manage Your Intellectual Property Law Practice is scheduled for video replay in San Antonio on March 1, 2006. To register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=5599>

New Law Practice Management Webcasts

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