
THE PRACTICE MANAGER

A NEWSLETTER PROVIDED BY THE LAW PRACTICE MANAGEMENT PROGRAM OF THE STATE BAR OF TEXAS
WEEK OF June 5, 2006

Overcoming the Fear of Financial Statements (webcast) – July 12, 2006

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The Technology Roundup

Gerry Morris, J.D.

Desktop Search Programs



I receive around forty emails a day, of which about two-thirds contain non spam information. In my office most phone messages are relayed to me by email if I am out of the office or otherwise unable to take the call. When I'm in the office and taking calls, most of the time the caller information is relayed to me through computer

instant messaging. (We use Yahoo IM). Every day my legal assistant lists in an email the day's mail. That way I am notified of important incoming mail and I also have an additional record of when it was received that is on my work computer as well as my laptop and home computer. When a document arrives by fax or courier I'm also notified by email that the document has been received and scanned. In short, we rely heavily on email for interoffice communication.

The problem is that with an average of forty emails a day, to

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The Coach's Corner

Debra Bruce, J.D.

Ineffective Management Styles



"A competent leader can get efficient service from poor troops, while on the contrary an incapable leader can demoralize the best of troops."

~ General John J. Pershing

Leadership has been defined as "influencing, motivating, and inspiring others through direct and indirect means to accomplish organizational objectives."¹ More simply stated, a leader's responsibility is to get the job done well

while keeping the group together. When the leader lacks adequate leadership skills, it undermines the successful management of a law practice.

Undoubtedly, we have each experienced a number of ineffective leaders in our life. Probably with some effort, we also can remember someone who led us very effectively. Why are there so many more ineffective leaders than effective ones? Surely they did not purposely choose to be ineffective. Did they know they were being ineffective leaders? How do you know whether *you* are being an effective leader? Answer: by the results you get.

So if you are not 100% pleased with the results you are getting from your staff, from your partners, in your family, from organizations you belong to -- perhaps it is time to assess your leadership competencies. Don't let yourself off the hook just because you are not the managing partner or president of your organization. Leadership emerges from all levels of a group or organization, not just from the top.

Traits and Behaviors of Effective Leaders

What traits and skills do you need to have to be an effective leader? Lists of leadership competencies vary, and that may be due to the situational nature of leadership. A competent leader in a psychotherapy practice may differ somewhat from one in a software development company or a law firm. Here are some links to lists of

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find a particular email even if I can remember the year in which I received it, I still have to search through about 14,600 emails. I could cut down on the number I have to search through by creating different folders in which to categorize and store read emails. But, frankly my experience with that has been that I won't take the time to move each email one by one into its proper folder. Given my limitations I've decided to store read emails in a folder labeled for the year in which I received them.

Searching through that many emails using the Microsoft Outlook search feature takes a while. For instance, searching through about 12,300 emails for the word "technology" in the subject line and body of the text took over three minutes. Even assuming I chose the correct search terms the first time and only had to run the search once, a few searches like that in a day eat up some time. Fortunately, there is an alternative.

The major Web search engines, Yahoo, Google and MSN all now offer desktop search programs that can be downloaded free. The desktop search programs basically cache every piece of readable data on your computer and allow it to be searched in much the same manner as the Web search engine counterparts search Internet web sites. Once the set up and initial indexing is completed any email, chat or text document on your computer can be found about as fast as you can type the search terms.

I tried the Yahoo and Google versions and settled on Google because the Google search program can be configured to search network drives and the Yahoo program cannot. I didn't try the MSN version. Once installed, the Google desktop search program began to "crawl" my computer and network drive to index all the data. The indexing function takes place while the computer is idle so that it doesn't interfere with normal computer usage. My computer was idle for about an hour while I was out for lunch and when I returned the process was complete. (Indexing of newly added material also takes place in the background). Once the indexing process is completed, depending on the selected options, the program allows search terms to be typed into a search box on the desktop or the task bar as well as into the familiar Google web page. An extra link appears on the web page to go to the "Desktop" search function. You can also eliminate the search boxes on the desktop and task bar. There is also a search box that appears directly on the menu bar of Outlook for searched limited to email.

The search with the word "technology" using the desktop search link on the Google web page took less than a second to yield results that included 1702 emails, 176 files and 52 hits from my web history. Links at the top of the page allow me to go to only the email, files or web history result. I refined the search to "technology column" and in less than a second had results listing 62 emails and 24 files in the familiar Google format that contains enough text from the documents and emails to allow me to locate the one I'm looking for. It's that simple.

Those of you who use Macs are probably chuckling right now

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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

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because the latest Mac operating system has this feature built in. The new version of Windows due out later this year also has a desktop search feature. For PC users with one of the presently available versions of Windows, one of the desktop search programs is simply a must have add-on as far as I'm concerned.

To download the Google Desktop Search program go to the Google home page at www.google.com. Then click on the link near the top of the page that is labeled "more." This will take you to a page with a link under the "Search" category labeled "desktop." Click on that link and you'll see download instructions.

When the program is first installed it also installs a bar on the task bar called "Gadgets." This is a collection of things such as clock, news tickers, weather information and the like that can be popped up or hidden by pressing the shift key twice. I have deactivated this feature by selecting "none" in the setup options activated by right clicking the system tray icon for the program. In the "preferences" option you can configure the program to search only certain items like emails and text files rather than the names of media files, web history and other materials. Here you can also chose a network drive to search.

Google will search the chat logs of the most popular IM services. This feature is important to me because we use Yahoo chat extensively to relay messages. Interestingly, Google will search MSN and Google chat logs but to search Yahoo chat logs a plug-in must be downloaded and installed. That plug-in is available through Google by going to the same page where you downloaded

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the Desktop Search program and clicking the link for "Google Gadgets and Plug-ins." On the page that appears click the link labeled "Indexing Plug-ins." This will take you to a page with a lot of indexing plug-ins including one called "YIM Archive Plug-in." But, here's something I learned by trial and error. Don't click the download link. Click on the link with the program description. This will take you to a download page. On that page click the link labeled "Learn More." That link will take you to a page with a link that is labeled, "Download Binary v1.3." This is the version you want. The version associated with the other download buttons has a bug that causes the program not to index messages from people using aliases. Since we use our real names as aliases (rather than the Yahoo screen name) in our office, the first version was basically worthless to us. After I figured out that there was an updated version available and installed it, the archived chats are now included in my Google desktop searches.

Google won't index documents scanned as an image unless they have been converted to text. Paperport, the program I use for basic document management has a feature that will automatically convert scanned documents to text and store the text in a search file that can be searched with the program's "All-in-One" search feature. The search program is not as versatile as Google. Paperport 11 contains an expanded search feature. I recently upgraded to Paperport 11 and will be writing on the upgrade soon.

E. G. "Gerry" Morris is a solo practitioner and has practiced law for over 27 years in Austin, Texas. He is certified as a Criminal Law Specialist by the Texas Board of Legal Specialization. His firm web site is at www.egmlaw.com. Email your comments and questions to Gerry at tech@egmlaw.com.

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.

You may have been working in a spreadsheet when you try to copy the Data from the spreadsheet and paste in into another only to discover you get either REF errors or a bunch of 0s. This is typically because Excel is pasting the formulas that compute the Data, rather than the Data itself. There is a way to copy and paste only the Data using a feature called Paste Special. Here's how you use it:

In Excel:

1. Highlight/Select the Data you want to copy
2. Edit > Copy
3. Open a new spreadsheet (or even an existing one)
4. Place the cursor in the Cell where you want the Data to be pasted
5. Edit > Paste Special
6. Select Values
7. Click OK

That's it!

leadership competencies developed by certain organizations:

U. S. Coast Guard:

<http://www.uscg.mil/leadership/leadci/encl1.htm>

Boy Scouts of America:

http://www.whitestag.org/aims/leadership_principles.html

Canadian government:

http://www.hrma-agrh.gc.ca/leadership/klc-ccl/model_e.asp

Donald Clark:

<http://www.nwlink.com/~donclark/hrd/case/chart1.html>

Despite the differences in industries and organizations, certain core competencies are necessary for effective leadership in any arena. Here are a few:

1. Communication: expressing facts and ideas succinctly and logically; listening actively and supportively; clarifying and verifying understanding; providing feedback
2. Vision: establishing objectives and the benefits to be derived from them; seeing possibilities; pointing the way
3. Strategic thinking: assessing options and the long-term probable outcomes of decisions and behaviors; planning
4. Development: empowering others by modeling, mentoring and delegating; building relationships; learning from mistakes
5. Taking charge: initiating action; making difficult decisions; setting direction; holding others accountable

For a review of the common elements in the leadership competencies identified by 62 different global companies, see Cambria Consulting's article at

<http://www.cambriaconsulting.com/new/files/LeadershipComps.pdf>.

Assessing Your Leadership Strengths

If you want to assess your leadership competencies, there are some self-assessments that you can order online. Here are a few links:

Campbell Leadership Descriptor

<http://www.ccl.org/leadership/assessments/CLDOverview.aspx?pageId=40>

KnowLEDGE for Leaders Assessment

<http://www.edgetrainingsystems.com/Store/tabid/91/CatalogItemID/30/CatalogID/1/psnavcmd/CatalogItemDetails/Default.aspx>

Hay Group Leadership Competency Inventory

http://www.hayresourcesdirect.haygroup.com/Competency/Assessments_Surveys/Leadership_Competency_Inventory/Overview.asp

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Central Michigan University Leadership Competency Assessment

http://www.chsbs.cmich.edu/leader_model/assess.htm

Pfeiffer – Leadership Practices Inventory, Self Instrument

<http://www.pfeiffer.com/WileyCDA/PfeifferTitle/productCd-0787967955.html>

Strengths That Become Weaknesses

If you determine that you have a number of leadership strengths, can you be certain that you are using them effectively? Leaders may tend to overuse their strengths until they become weaknesses. In large law firms we often see that the leaders are good at getting a job done right and as soon as possible, but perhaps at the sacrifice of keeping the people involved and motivated. Hence, many large firms today are experiencing costly attrition and crippling gaps in experienced talent at the 4 to 7 year levels. In other professions, such as psychotherapy, many of the leaders may be sensitive to individuals and may take time to make sure that everyone feels involved and committed, but struggle to get the job completed on time or as intended.

Getting 360° Feedback

We all have blind spots when it comes to assessing ourselves. To get a more realistic view of the impact of our leadership style, or to see where our style needs to be fine tuned, we need to ask those people around us for feedback. Unfortunately, many people are not comfortable giving direct and candid responses to such inquiries, especially if they believe that we have the ability to negatively impact their careers. To overcome that impediment, we can use a confidential multi-rater feedback survey. It is called a 360 survey because respondents can come from positions 360 degrees around us, including bosses, co-workers, direct reports, clients and even colleagues outside the organization and family members. Respondents confidentially and sometimes anonymously rate the subject leader on specified leadership behaviors, and in some surveys they may provide written comments as well. Facilitators may also be used to confidentially interview respondents and to compile all the responses in such a way as to shield the identity of the respondents.

Here are some links for information about a few 360 instruments:

Kaplan Devries Inc. – Leadership Versatility Index

<http://216.92.141.204/index.php/whatwedo/3/C26/21/>

Pfeiffer – Leadership Practices Inventory

<http://www.pfeiffer.com/WileyCDA/PfeifferTitle/productCd-0787967270.html>

Profiles International – Checkpoint 360

<http://www.compassassociates.net/files/checkpoint.htm>

Center for Creative Leadership – Executive Dimensions

<http://www.ccl.org/leadership/assessments/executiveOverview.aspx?pageId=54>

The Kaplan Devries instrument referenced above is specifically designed to identify when our overuse of a strength becomes a weakness.

To Get Better, Get Feedback

Whether you engage a coach or consultant to facilitate a full-blown 360 review of all of your managing partners and practice group leaders, or just sit down to have a candid talk with your subordinates, get some feedback. We can't even drive a car without feedback from the instruments on our dashboard and the stripes on the road. Certainly we need feedback to drive something as complex as a law firm!

¹ Jeffrey D. Horey (Caliber Associates) and Jon J. Fallesen (Army Research Institute), *Leadership Competencies: Are we all saying the same thing?*

Debra Bruce (www.Lawyer-Coach.com) practiced law for 18 years, before becoming a professionally trained Executive Coach for lawyers. She is Vice Chair 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 Update

One look at our list of upcoming events on page five of this newsletter, should give you an idea of the busy seminar schedule that we have lined up this year. While many of the scheduled LPM programs are standard panel discussion format, I'd like to point out that we do have one breakfast discussion scheduled for June 30, 2006 in conjunction with the **Advanced Real Estate Course**. If you you're not exactly sure what goes on at our breakfast discussions, let me attempt to describe how it works.

The topic of the June 30th breakfast discussion is **The Importance of Planning Ahead** and will start off with a 20-minute presentation on the importance of goal setting and business plans. That will be followed up by table discussions on planned staffing, equipment purchasing, space planning, creating a marketing strategy, preparing for retirement, etc. Each table in the meeting room will focus on one topic for discussion. The last ten minutes of the program will be used to allow individual tables to report back to the overall group and share their findings.

We've had only one other breakfast discussion this year and the feedback we received was very positive. The attendees really got worthwhile tips and information from their peers and all were very active and participatory. This certainly is not the norm for CLE presentations but it does seem to be very effective. The cost of this program is \$55, which does include a full breakfast buffet, so be sure to join us in San Antonio on June 30th!

Upcoming Events

The Importance of Planning Ahead, breakfast discussion, will take place live in San Antonio on June 30, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6252>

Managing Your Personal Injury Practice with Legal Technology will take place live in Dallas on July 11, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6219>

Perfecting Your Criminal Law Practice will take place live in Dallas July 25, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=5631>

Perfecting Your Estate Planning and Probate Practice is scheduled for video replay in San Antonio on August 1, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6181>

Perfecting Your Estate Planning and Probate Practice is scheduled for video replay in Dallas on August 29, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6182>

Managing Your Personal Injury Practice with Legal Technology will take place live in San Antonio on August 1, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6237>

Managing Your Personal Injury Practice with Legal Technology is scheduled for video playback in Houston on August 22, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=62378>

Perfecting Your Estate Planning and Probate Practice is scheduled for video replay in Dallas on August 29, 2006. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6182>

Law Practice Management Special Offers

Books of the Month

The Complete Guide to Designing Your Law Office

Retail - \$129.95

Sale Price - \$90.95

Your office space is part of your firm's image. It must also be functional. Whether you're planning a new office or remodeling your current office (with or without the assistance of a design consultant), you'll learn how to create or change your space while avoiding needless disruption, chaos, and cost overruns.

The Lawyer's Guide to Increasing Revenue

Retail - \$79.95

Sale Price - \$55.95

If you are ready to look beyond cost-cutting and short-term solutions, and toward new revenue opportunities, then *The Lawyer's Guide to Increasing Revenue* will show you how you can achieve growth using the resources you already have at your firm. The vast majority of law firms continue to leave dollars on the table. Now you can ensure your firm isn't one of them.

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

**SPECIAL EXTENDED – ENTIRE MONTH OF
JUNE NO SHIPPING CHARGES ON ANY
BOOK ORDER!**

Law Practice Management Webcasts

Rise to the Top with a Top Notch Legal Team will be webcast on June 21, 2006. To register, visit: <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=5982>

Financial Management of Your Law Practice will be webcast on July 12, 2006. To register, visit: <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6265>