
THE PRACTICE MANAGER

A NEWSLETTER PROVIDED BY THE LAW PRACTICE MANAGEMENT PROGRAM OF THE STATE BAR OF TEXAS
WEEK OF October 9, 2006

Managing the Back Office of Your Law Practice – November 8, 2006

Visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6264> to register

The Technology Roundup

Gerry Morris, J.D.

Choosing a Projector



Whether in the courtroom or boardroom it's becoming increasingly important to make effective presentations utilizing audio/video equipment. In my practice I find that more and more of my adversaries are preparing presentations of some sort for juries that require projection of an image. This may be, for instance, displaying evidence to the jury,

playing a video, or using a PowerPoint presentation to guide the jury through argument. My personal experience as well as studies conducted by jury researchers has shown that visual presentations are effective. In boardroom and conference room settings, A/V presentations have become the norm.

In the larger counties, the courtrooms are often equipped with "built-in" A/V facilities so that all a litigant has to do is

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The Coach's Corner

Debra Bruce, J.D.

Keep the Cash Flowing



Have you ever considered what role you may play in the effective functioning of your office staff? I have worked with lawyers who were unhappy with the performance of their administrative assistants, and who wondered what to do to correct the situation. I have worked with dedicated firm administrators and support staff who were stressing to the breaking point from working with difficult attorneys. Even as a lawyer

myself, I learned that at times I made it harder for support staff to do their best work. The information in this month's article comes from my own experience, from coaching clients, and from informal interviews of legal support staff.

Here are some of the most common responses about what lawyers do that discourage, demotivate or down-right impede good performance by support staff. Are you brave enough to ask your staff whether you are committing any of these management mistakes?

1. Giving work that must go out today to the assistant in the last hour of the scheduled work day (the most frequent complaint).
2. Having erroneous assumptions about the time required to complete a task or about the other work already on the assistant's agenda, and not making inquiries to check those assumptions. (I was surprised to discover that it usually took longer for an administrative assistant to do everything necessary to get a letter out the door than it took me to draft the letter.)
3. Not giving the support staff all the information they need to get the project done, or even clues about where to find the needed information.
4. Not giving the administrative assistant a heads up about the expected needs and events of the day, deadlines to meet, or the priorities to assign to multiple tasks.

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find out ahead of time what format the visual material must be in to work with the system. For instance, in Travis County, all the courtrooms either have an A/V system installed or have a portable system available that accommodates input from the VGA output of a computer, audio/video input via the three standard RCA plugs and has a document camera that will project opaque images such as hard copies of documents. The system projects the images on a wall mounted screen. Other courthouses I travel to have screens available but no built in projection equipment. Still others have no A/V equipment whatsoever.

If your practice takes you to courtrooms with no or inadequate A/V equipment or to meetings in settings where a projector is not available, you may want to consider investing in a projector. Like all other electronic devices, in the past few years the price has continued to go down while the quality has steadily gone up. There are many good projectors on the market now for under \$1000. If what you want is a standard projector for under a grand, take a look at the InFocus IN24 or the Epson PowerLite S4. However, for a much more versatile device that is especially useful in the courtroom I suggest you consider spending about \$1,500 and take a look at the Toshiba TLP-XC2500U.

The Toshiba TLP-XC2500U is a DLP projector rated at 2500 ansi lumens (plenty of brightness for a semi dark room). Its resolution is XGA 1024 x 768 resolution, and delivers a 400:1 contrast ratio. But, the feature that makes this projector worth the money is a built-in document camera. The projector has a folding arm with a 3 megapixel document camera attached that makes it possible to project just about anything including hard copies of photographs, documents, objects or anything else that might be introduced into evidence or that might be relevant to your presentation. The projector also accommodates input from a computer through a VGA port, Video through either a standard RCA jack or S-Video port and audio through either RCA jacks or a stereo mini-jack. The remote control operates all functions of the unit. In short, if you bring this projector to your courtroom or meeting room, there's not much that you can't project onto a screen.

I have the predecessor model to the TLP-XC2500U, a LCD unit with a document camera of much less resolution. I have used it now for about 5 years and wouldn't consider a projector without the document camera. I bought mine refurbished but still paid about twice what the TLP-XC2500U costs new.

If you already have a projector, you can purchase a document camera that will work through the VGA port of a standard projector. Toshiba makes one as does Epson.

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.

The Practice Manager is a newsletter published by the Law Practice 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 Practice Management Program of the State Bar of Texas

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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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Legal Support Staff Training Series

Legal Support Staff Workflow and File Management Training – Live

El Paso – November 2, 2006

This installment of the popular Legal Support Staff Training Series will address issues related to workflow management and records / file management.

<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6491>

Legal Support Staff Technology Training - Live

Dallas – November 28, 2006

Your Support Staff can greatly benefit from this popular live training program. Topics such as timekeeping, billing, communication issues, business writing basics and file management will be discussed. Seating is limited – register your staff now!

<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&ID=6617>

Legal Support Staff Technology Training - Live

Austin – December 2, 2006

Your Support Staff can greatly benefit from this popular live training program. Topics such as timekeeping, billing, communication issues, business writing basics and file management will be discussed. Seating is limited – register your staff now!

<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&ID=6612>

For more information, visit www.TexasBarLPM.com and click on "Seminars"

5. Blaming support staff for the attorney's own mistakes or carelessness.
 6. Giving instructions in a cryptic, stream-of-consciousness, or fire-hose kind of way and not encouraging clarifying questions.
 7. Giving unspecific feedback, no feedback, only negative feedback, or giving feedback to the staff supervisor instead of directly to the relevant staff person.
 8. Expecting staff to have the flexibility to stay 15 minutes or even hours late on short or no notice, but not reciprocating by flexing with their needs to come in late or leave early.
 9. Asking a staff person to attend to an attorney's personal needs or wishes during peak workloads.
 10. Not assisting staff in working out conflicting demands of multiple timekeepers assigned to them, or believing that a partner's work trumps an associate's or a lawyer's work trumps a paralegal's, regardless of urgency.
 11. Conveying the impression that non-attorneys are not valuable, by excluding staff from firm functions and by not giving them input on decisions that affect them; expecting them to be team players when they aren't treated like team members.
 12. Making it unsafe to report errors or offer suggestions for improvement by having a stern, defensive or demanding demeanor.
4. Make expectations and instructions clear, putting them in writing if they are detailed or complicated.
 5. Seek input and feedback from support staff. When possible, give staff an opportunity to participate in decisions that affect them, such as whether to promise delivery of something today or tomorrow or changes in attorneys assigned to work with them.
 6. Keep tone, words and demeanor respectful and professional, recognizing that a lawyer's attitude and behavior reflects more on his/her own maturity and competence, than on the staff member's.

How do you rate? If you think you never commit any of the "offenses" in the first list, you probably also suffer from a lack of self-awareness. If you are doing many of the actions in the second list, you probably have engendered loyalty, tolerance, and willingness to go the extra mile from staff members in your firm. If you are getting mixed results from staff, see whether you would like to experiment with some new behaviors. It is difficult or impossible to change other people, but we can change our own attitudes and behaviors. Sometimes when we change, others do, too.

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 board member and past leader of Houston Coaches Network, the Houston Chapter of the International Coach Federation. She welcomes your questions and comments at debra@lawyer-coach.com.

In my conversations with support staff, they didn't just complain about bad experiences. They also gave examples of some of the things exemplary attorneys do, such as:

1. Frequently give sincere acknowledgements of the specific contributions of staff and express appreciation for their efforts, including the little things staff members do on a daily basis.
2. Work towards a goal together. Share information about the twists and turns and objectives of a case or transaction. Seek information or remain open to ideas and suggestions. It makes it easier for support staff to catch mistakes (yours and theirs), make wise decisions, and take ownership in the project when they are fully informed and involved.
3. Take time to just chat or share information in a relaxed circumstance at least once per month. Information and feedback can flow more freely both ways without creating as much resistance and defensiveness.

Texas Paralegal Day

Press Release

The State Bar of Texas was the first bar association in the United States to create a separate division for paralegals. The Paralegal Division of the State Bar of Texas (the "Division") was created on October 23, 1981. The Division has been in existence for 25 years, and is celebrating its 25th Anniversary.

In light of the exclusive use of the paralegal title, the Division obtained a Texas House Resolution to promote the adoption of Texas Paralegal Day. Please join us in recognizing and celebrating Texas Paralegal Day on October 23, 2006, and the Division's 25th Anniversary.

For more information about the Division, visit:

www.TXPD.org

Law Practice Management Tip

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

Like most users, you probably play fast and loose with the upward storage limit of Outlook. That's because you want to save just about everything. The same applies to attorneys. There's a really simple way to save your email messages, along with any attachments, with just a few clicks.

For any email you want to save outside Outlook (like in the client's file) all you do is:

Open the email

FILE / SAVE AS

Change the message type at the bottom of the dialog box from the default (which may be plain text, HTML or rich text) to Outlook Message Format (.msg)

Navigate at the top of the dialog box to the folder you want to save the message in.

SAVE

This will save the original email along with any attachments or graphics. You can then delete the original from Outlook.

To find and open the message later you access it from Windows Explorer. You will note it has an envelope icon.

Law Practice Management Update

Be sure to check out our calendar of events on the next page to take advantage of the numerous educational opportunities available through the Law Practice Management Program this Fall. Regardless if you're a solo just starting out, an established attorney with employees, or legal support staff, chances are we have just the class for you.

In the coming months, you will see some changes to Law Practice Management's Legal Software Directory. We will be rolling this into the State Bar's new overall **Online Marketplace**. What exactly will this marketplace be? Think of it as an "Amazon.com" geared specifically to the needs of the legal profession. In other words, anything that you could possibly need for your practice, can probably be found in the State Bar Marketplace. Right now we are in the process of creating categories where the different products and services that will be listed can be found. It's a pretty long list at the moment and we hope to refine it some and keep it simple. The products listed in our software directory will eventually find their way to the appropriate category in the marketplace.

We don't have a launch date just yet, so you can still access our software directory in the meantime. We are hoping that by launching this market place, attorneys will have an organized, easy to search directory of countless products and services that they can use in their practice.

The logo for BarTech06, featuring the text "BarTech" in a bold, white, sans-serif font with a blue shadow effect, and "06" in a smaller, white, sans-serif font to the right, all set against a dark blue rectangular background.

Technology Strategies to Stay Competitive in the Practice of Law

DALLAS Live on November 8-9, 2006 at the Holiday Inn Select Dallas Central

To view the brochure or register: <http://www.TexasBarCLE.com/CLE/AABuy0.asp?IID=6125&sProductType=EV>

This two-day CLE course is co-Sponsored by the Law Practice Management Program helps you understand how technology and practicing law all fit together (and includes lunch each day)! Hear lawyers talking to lawyers about technology:

- In the Front Office
- In the Back Office
- On the Road (Remote Lawyering)
- In the Courtroom: From Discovery to Presentation

Plus, don't miss a special session focused just on reducing the special ethical and malpractice risks attorneys face in using technology.

Upcoming Events

Building Your Practice will take place live in Austin on October 27, 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=6490>.

Compliance Conference 2006 will take place live in Dallas on October 27, 2006. For more information or to register, call 214-860-5900.

Legal Support Staff Workflow and Records / File Management Training will take place live in El Paso on November 2, 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=6490>.

Law Practice Software Training – Financial Management of Your Law Practice Using PCLaw will take place live in Houston on November 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=6578>

BarTech will take place live in Dallas November 8 -9, 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=6125>

Legal Support Staff Training is scheduled live in Dallas November 28, 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=6617>

Legal Support Staff Training is scheduled live in Austin December 2, 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=6612>

Legal Support Staff Training is scheduled live in Edinburg December 6, 2006. For more information call 800-204-2222, ext. 1300

Law Practice Software Training – Managing Client Files with Time Matters will take place live in Houston on December 9, 2007. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6577>

Law Practice Management Special Offers

Books of the Month

How to Start and Build a Law Practice

Retail - \$69.95

Sale Price - \$48.95

If you have a question about starting and growing your own law practice, or improving your existing solo or small firm practice, Jay Foonberg has the answers in this power-packed, updated, and expanded new edition. Learn it all from a practicing lawyer who provides you with real answers, for real practices, gained from real experiences.

The Lawyer's Guide to Records Management and Retention

Retail - \$99.95

Sale Price – \$69.95

This book is intended to address the issues arising from the need to manage records and information in a law office and use records management as a tool for:

- *improving risk management
- *managing e-mail as part of the client file
- *implementing records retention schedules
- *managing records during investigations, audits, claims, and litigation
- *serving the techno-centric and techno-phobic practitioner
- *and using records management as a pipeline to knowledge management
- *and much more!

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

Law Practice Management Webcasts

Managing the Back Office of Your Law Practice will be webcast live on November 8, 2006. To register and for more information, visit <http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=6264>

**MORE WEBCASTS COMING SOON – CHECK
OUR SITE REGULARLY!**