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# THE PRACTICE MANAGER

A NEWSLETTER PROVIDED BY THE LAW PRACTICE MANAGEMENT PROGRAM OF THE STATE BAR OF TEXAS  
WEEK OF December 11, 2006

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**Supervising and Ethical Support Staff (Webcast) – January 9, 2007**

Visit <http://www.texasbarcle.com/CLE/AABuy0.asp?sProductType=EV&IID=6810> to register

## *The Technology Roundup*

Gerry Morris, J.D.

### **Remote Computing Made Simple: Go To My PC**



I've written several articles about connecting remotely over the Internet to a computer at the office. The most versatile type of connection is via a virtual private network (VPN), but setting up the components required to facilitate the connection may be more than some want to undertake. If you're looking for a simple solution to allow connection

of a remote computer, such as a laptop, to one or a few computers at the office, Go To My PC provides an easy to use alternative to a VPN.

Basically, Go To My PC allows you to connect over the Internet to a host computer at your office and view the screen of the host computer. The host computer can be operated

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## *The Coach's Corner*

Debra Bruce, J.D.

### **Work / Life Balance: Are You Tottering on the Brink?**



As a coach to lawyers, this is the time of year when I really hear the life balance questions. All year lawyers struggle to maintain work/life balance, but the challenges become more acute during the holidays. At the same time that family and friends clamor for our attention, year-end deadlines for budgetary, tax or financial reporting purposes cause our clients to pressure us with non-negotiable demands.

Here are tips to implement all year long to help achieve balance between work and your personal life, but especially during the holidays.

1. **Put your own oxygen mask on first.** This is the most important tip, and the one you'll be most tempted to skip. The flight attendants tell you this for a good reason. You can't help others or meet their demands if you deplete your own reserves. What replenishes your energy? What relieves stress for you? Spending a few minutes with nature nurtures the soul, even if you merely water the plants in your office. Create space for 15 minutes of quiet at the start of your day, and protect it. It sounds counter-intuitive and maybe impossible, but my clients are surprised at how problems roll off their backs, instead of developing into time-sucking crises, when they start the day with quiet time.
2. **Buy time.** Time is the biggest luxury in the life of a lawyer, so use some of that above-median income to buy more of it. Pay someone else to handle the routine and redundant tasks that eat up time. Hire a concierge, errand service, or personal shopper. Hire a professional organizer for your office or home. Pay your housekeeper or nanny to carpool and cook. Do your holiday gift shopping online. Use a dry cleaner that picks up and delivers. Buy and freeze healthy, preservative-free, ready-to-cook meals at places like [Village Table](#), [Dine Wise](#) and [Diet](#)

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from the remote computer restricted only by the speed of the Internet connection. Additionally, there is a file transfer utility that allows drag and drop file transfer from one computer to the other. A remote printer utility allows printing of a file located on the host computer through a printer attached to the remote computer.

To sign up for Go To My PC, go to the company's website, [www.gotomypc.com](http://www.gotomypc.com). There you'll discover one reason why you might want to go to the trouble of setting up a VPN. Go To My PC charges a monthly fee for each host PC. The first PC is \$19.95 monthly with a 25% discount for annual payment. Two PCs run \$29.95. Each additional PC after the second one costs 14.95 per month. The one time costs of using a router with VPN server capabilities is less than a year's worth of Go To My PC fees. What you pay for with Go To My PC is simplicity and convenience.

Once you sign up with Go To My PC and establish an account the next step is to download onto the host computer a small program that runs as a service and establishes an icon in the system tray showing the computer's availability for a connection. The program broadcasts to Go To My PC's connection server the IP address of host computer. From the remote computer, you go to the Go To My PC connection website and log on. A screen will appear with a list of all the computers registered to your account with an indication of which ones are available for connection. You select the one that you want to connect to and, if you are using a remote computer that will allow you to download and install a program, a viewer program is installed on the remote computer. The screen of the host computer will appear in a window in the remote computer. The window can be resized or enlarged to full screen. If the remote computer has accepted the viewer program (or it has been downloaded in a previous session) all of the Go To My PC features, such as file transfer and remote printing, will work. If your using a public computer for a remote that will not allow file downloads, there is a way to view and operate the host computer through a Java enabled browser. However, the file transfer and remote printing features as well as some of the viewing options will not work.

There is also a download that allows access to a host computer from a Windows based Internet enabled handheld computer such as a Treo 700 smartphone. I have not seen this setup work but I would think it would be of limited use because of the size of the handheld screen.

I don't use Go To My PC in my practice, however, I recently spoke at length with a lawyer who does. He uses the service to connect with a single computer on his desktop at his office. He told me that the service has worked flawlessly for him. He frequently accesses his office computer from a remote computer at a library where he often does research as well as from his laptop at home and when traveling. He demonstrated the connection procedure for me and it was a simple as advertised.

Given the pricing of the service, Go To My PC is a good

*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](mailto:olopez@texasbar.com)

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method for remote access for one computer or maybe two. After that its simply cheaper to set up a VPN. The only advantage Go To My PC has over a VPN is the ability to access the host computer and use a limited number of features from a public computer. If you have the ability to configure the remote computer it takes about two minutes to configure a remote computer to access your VPN and a few seconds to remove the configuration when you're done.

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Gourmet. Use housekeeping and lawn services, and get valet pick up for auto maintenance. Save your precious time for your loved ones, your clients and yourself.

3. **Improve your delegation skills.** Don't do for others what they can do for themselves. Empower them by giving them the training they need, and then express your confidence in their ability to manage it. This goes for home and office. I was stunned at how much time I found when I stopped minding other people's business. Be willing to accept less than perfect performance. Let them do it their way sometimes. Ask yourself: How important is it? What outcome do I really need? Don't be an island, a hero or a martyr. Collaborate with others to get things done. Hire an assistant who has skills and talents that are complementary to yours, not duplicative.
4. **Learn to say no. Reduce commitments.** Periodically review your memberships and recurring commitments to weed out a few. Before taking on a new commitment, ask yourself, "Do I really want to? For the sake of what?" If the answer is not a resounding yes, why are you considering it? To please someone else? You'll be more likely to *displease* them if your plate is too full or you have creeping resentment from doing something you didn't really want to do. Remember: Each time you say yes, you are saying no to something else. You may be saying no to being fully present with your kids, to doing your best on an important project, or to rekindling your relationship with your spouse.

Many people have trouble saying no diplomatically, so here are a few strategies:

- a. **Stall for time.** Don't answer right away. Say, "Let me check my calendar (my current work load, or my spouse's commitments), and get back to you." You can think more clearly and determine what you *really* want outside the pressure of the moment.
- b. **Offer another solution.** Most people don't really care so much who does what; they just need a solution to their problem. Say, "You know, I'm not really very good at that, but Beverly is a whiz at it. Let me give you her number." Or, "I don't really have time to participate, but I would be willing to make a financial contribution for the project."
- c. **Clarify priorities.** Sometimes it is politically dangerous or even impossible to turn down a project at work. It may be better to say, "I would *love* to work on your project. With my current commitments I could get started in about three weeks. Would that work for you?" If some of your existing commitments are for the same person, or you simply do not have the power to say no, say "I have an over-flowing plate right now. Can we go through my assignments to prioritize them?" or "Can you and John and I work out the priorities among your assignments to me?"
- d. **Sandwich your no between positive statements.** "That's a really worthwhile program you're proposing. Unfortunately my time is fully committed right now. I

admire your dedication to making a difference." Or, as long as you mean it, "Perhaps I can help next time if we get an earlier start."

- e. **Don't give lengthy explanations.** If you say you can't, they may try to find solutions so that you can. Or they may hear you as insincere or untruthful. Simply say "I already have conflicting commitments." If that won't do, it would be better to make it clear that it's your choice. "My work requires a lot of long hours. So I reserve what little extra time I have to focus on my family."
5. **Improve your time management skills.** Systematize and automate as much as you can. Create a system for doing redundant tasks and document the system. It will be more efficient, as well as much easier to delegate or teach someone else, if you have detailed written instructions. Invest in software and hardware that will reduce steps and do work for you. Organize your office and your home so you don't waste time looking for things. Read some of the articles in previous issues of [The Practice Manager](#) or on my website for more time management tips.
6. **Double up.** Plan some of your activities so that they do double duty for both personal and career benefit. Enjoy recreational reading by listening to books while you drive to work or a meeting (it reduces the stress of traffic). Invite your clients to bring their kids to the ballgame when you bring yours. Take a client and spouse to dinner along with your spouse, then after dinner go dancing just with your spouse. Let your kids jog with you, or use a jogging stroller. (Let go of the competitive drive that says you have to get your time down or run farther than last time.) Let lifting and playing with your kids be your exercise. Half an hour of playing tag in the yard will get your heart rate up and delight your children.

Balance is not something you achieve, and then you're done. Maintaining balance requires intention and constant adjustment. Like learning to ride a bicycle, it gets easier with practice, but it helps to have a partner run along side you at first. A buddy or a coach can help.

*Debra Bruce ([www.lawyer-coach.com](http://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](mailto:debra@lawyer-coach.com).*

## Law Practice 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 it is a good idea to provide your client with a "We Do-You Do List?" The list describes the obligations of the law firm and the client during the course of the matter. Examples are

### We Do Items

- Take your calls
- Do our best to advocate your case
- Do our best to solve problems as they come up
- Advise you of the maximum settlement for your case
- Tell you whenever the other side makes an offer of settlement

### You Do Items

- Be honest with the Court and us
- Be reasonable in the number of calls you make to us
- Read what we send to you
- Follow all Court Orders
- Pay your bill

Putting what you will do in writing reassures the client and highlights everyone's professional obligations plus it should help eliminate surprises.

## Legal Support Staff Training Series

### **Legal Support Staff Workflow and Records / File Management Training**

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

*Dallas – February 21, 2007*

*Houston – February 28, 2007*

### **Legal Support Staff Technology Training - Live**

*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!*

*Waco – April 25, 2007*

For more information, visit [www.TexasBarLPM.com](http://www.TexasBarLPM.com) and click on "Seminars"

## Law Practice Management Update

As 2006 comes to a close, it is time to start making plans (and resolutions) for the new year!

Law Practice Management entered the world of webcasts in 2006 and we will continue to offer these programs in 2007. We are planning on offering at least one webcast per month that deal with specific topics such as establishing a paperless office, bookkeeping issues, IOLTA issues, etc. Most of these webcasts will be 2-hour programs with a few being 1 – 1 ½ hours in duration. Be sure to check our web site periodically for updates.

Law Practice Management has also expanded its Legal Software Directory into the State Bar's new "Marketplace." This new directory includes listings not only for software and other tech-related items, but also court reporting services, expert witnesses, staffing service, insurance, etc. Anything that you could possibly need in your day-to-day practice, will more than likely be listed in the marketplace. This new service is live at this moment, but 2007 will see the real push to get new services and products listed.

2007 will also see the launch of all new redesigned Practice Manager! That's right, the very newsletter that you're currently reading will get a much-needed facelift, making it much more attractive! Not to worry, you'll still get the same practical content and information, but you'll get it in a package that's much easier on the eye! The January issue will be the first issue in the new format so keep your eyes open for that!

There are some other projects and programs that we are discussing for 2007 and we will surely let everyone know more about those once we have more information. In the meantime, do continue to check our website periodically and feel free to contact us with any thoughts on the programs and services we are currently offering or any suggestions on programs / services you would like to see offered. Have a wonderful holiday season and a prosperous and successful New Year!

## Upcoming Events

**Law Practice Software Training – Managing Client Files with Time Matters** is scheduled live in Houston January 6, 2007. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy0.asp?sProductType=EV&IID=6802>

**Law Practice Software Training – Managing Client Funds with Billing Matters** is scheduled live in Houston January 20, 2007. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy0.asp?sProductType=EV&IID=6811>

**Legal Support Staff Training – Workflow and Records / File Management Training** is scheduled live in Dallas February 21, 2007. For more information or to register, call 800-204-2222, ext. 1300.

**Legal Support Staff Training – Workflow and Records / File Management Training** is scheduled live in Houston February 28, 2007. For more information or to register, call 800-204-2222, ext. 1300.

**Perfecting Your Elder Law Practice** is scheduled live in Houston March 8, 2007. For more information or to register, call 800-204-2222, ext. 1574 or visit <http://www.texasbarcle.com/CLE/AABuy0.asp?sProductType=EV&IID=6507>

**Legal Support Staff Training** is scheduled live in Waco April 25, 2006. For more information or to register, call 800-204-2222, ext. 1300.

**Planning to Conquer the Real World of Private Practice** is a ½ day program conducted at all law schools for 3-L students and recently-licensed attorneys. This course is free to current law students. The price for licensed attorneys is \$55. For more information or to register, call 800-204-2222, ext. 1518.

Dates:

February 10, 2007 – Waco (Baylor)  
February 17, 2007 – Austin, (University of Texas)  
February 24, 2007 – Lubbock (Texas Tech)  
March 3, 2007 – Houston (University of Houston)  
March 24, 2007 – San Antonio (St. Mary's)

## Law Practice Management Special Offers

### Books of the Month

#### *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!

#### *Flying Solo: A Survival Guide for the Solo and Small Firm Lawyer*

Retail - \$99.95

Sale Price – \$69.55

Newly revised and completely updated, the fourth edition of this comprehensive guide includes practical information gathered from a wide range of contributors, including successful solo practitioners, law firm consultants, state and local bar practice management advisors, and law school professors. All the contributors share tips and advice that can be easily implemented in your solo or small-firm practice.

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

## LPM Webcasts

**Supervising an Ethical Support Staff** is scheduled to take place live via webcast on January 9, 2007. For more information or to register, call 800-204-2222, ext. 1574 or visit

<http://www.texasbarcle.com/CLE/AABuy0.asp?sProductType=EV&IID=6810>

**More Webcasts coming soon!**