

# THE PRACTICE MANAGER

## ALTERNATIVES TO HOURLY BILLING

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### THE TECHNOLOGY ROUNDUP

Gerry Morris, J.D.

#### Amicus Attorney Steps Back and Goes Forward with a New Version

One of the major players in the case management software market Amicus Attorney, has released a new product, Small Firm Edition 2008. The interesting thing is that Small Firm is based on Amicus' V+ platform that was supposed to be superseded by last year's release of Version 7.



Let me back up a minute and make a few general comments about case management software. As I have written in previous columns, case management software is the backbone of a reduced paper office. The software organizes all file information including scanned and generated documents in an easy to use interface. The two leading players in the market are Amicus Attorney and Lexis Nexis' Time Matters. I use Amicus because the interface is extremely intuitive.

Each client file appears on an index list and, when opened, appears on the computer screen as an image of a manila folder with different categories of information under labeled "clasps". Please refer back to my previous articles for a more in depth description.

When I purchased Amicus some five years ago, it was also feature for feature the equivalent of Time Matters. Since then, Lexis Nexis has acquired Time Matters and pumped a lot of resources into its development. I have some experience with Time Matters from teaching a clinical program at UT Law School. We implemented it there last year for one of the clinics. It is indeed a very feature

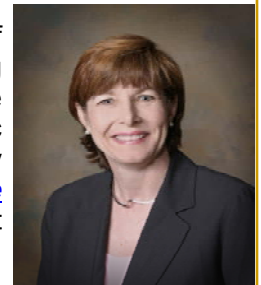
See *Technology Roundup* on page 4

### THE COACH'S CORNER

Debra Bruce, J.D.

#### Achieving Balance from the Inside Out

Lately I have received a rash of requests for coaching and speaking on the topic of attorney work/life balance. You can find some specific suggestions on that topic in my article titled [Work/Life Balance: Are You Tottering on the Brink?](#) first published on December 11, 2006 in The Practice Manager.



#### Clients as Mirrors

Coaches remark that their clients often bring to them the very challenges that the coaches themselves need to address. What a blessing! It is so much easier to see the options available to someone else. Then we can just listen to the ideas and observations we offer our clients, and apply them to our own lives.

I have been struggling to keep my own workload in balance. In my practice I see attorneys reluctant to ask for help. I see them postpone the investment in hiring the additional quality assistance they need. I see lawyers hold themselves to an impossible standard. I see lawyers say "yes" to too many commitments. I see them promise a document delivery at the earliest date possible, without finding out when the client really needs it, or without assessing how much time they need to meet their existing commitments. I see attorneys spend time on low priority squeaky wheels and distractions, instead of protecting their time for more important projects. I warn them to "put your own oxygen mask on first" as I watch them put the needs of family and clients ahead of their own, once again. At one time or another I do all the same things.

#### Internal Experience as a Mirror

Sometimes the flip side occurs. I recognize something in my own life that I can share with my clients for application

See *Coach's Corner* on page 2



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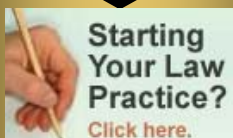
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## Coach's Corner continued from page 1

to their situation. This week I traveled to Chicago for business. One of my meetings got postponed, and I took the opportunity to visit The Art Institute, with its remarkable collection of Impressionist art.

To my own surprise, I felt a sense of exhilaration and anticipation as I entered the doors. I planned to just sit and soak up some of my favorite paintings. As I entered the Impressionist corridor and caught my first glimpse of some of the paintings, emotion welled up in me and my eyes watered.

"What's this about?" I asked myself. I became aware of a deep longing. A longing for spaciousness. For beauty. For unleashing my creativity. For permission to just be, without doing. For listening to the still small voice within.

I spent two hours luxuriating in those rooms, and the experience renewed my mind and body. I sat that evening in an airport waiting for a flight delayed by three hours. I knew it would be well after midnight when I touched down in Houston. Yet, I felt refreshed and optimistic.

### Nurturing the Soul

Sitting in The Art Institute, I rediscovered the vital importance of taking time to nurture my soul. Ralph Waldo Emerson said, "The soul's emphasis is always right." I had not allowed time to listen for that emphasis.

What nurtures and renews you? Listening to music? Walking in nature? Exercising? Staring out the window or at an aquarium? Laughing? Petting a beloved animal? Watching a baby sleep? Singing? Gardening? Sitting in silence? Painting? Gazing at a fire or a burning candle? These are a few activities that renew and refresh people. They unlock our muscles and free our minds from that compulsive whirring.

### Creating Stillpoints

As I sat in The Art Institute of Chicago, I realized how far I had fallen out of the habit of my morning quiet time. As little as 15 minutes in the quiet makes a big difference in the quality of the rest of the day. My clients who try it report more resilience and reduced reactivity to the stressors of the day. A wise person said, "Meditate half an hour every day, except when you are really

busy, of course. Then meditate an hour."

Steven Keeva, author of *Transforming Practices: Finding Joy and Satisfaction in the Legal Life*, recommends finding several brief times during the day in which to create "stillpoints," even if only a couple of minutes. Stop when you hang up the phone, or before you start the next project. Close your eyes and breathe deeply. Put your mind on a peaceful place or an inspirational phrase or something for which you are grateful. These little stillpoints can increase our mindfulness, and return us to being "at choice" in our lives.

I'm starting a new regime of daily quiet time and stillpoints, in which I will allow the renewing of my mind. Will you join me in seeking balance from the inside out? If you do, please share your experience with me.

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

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**PARALEGALS FLY TO IRELAND**

**April 26 – May 3, 2008  
 (Seven Days and Six Nights in  
 Killarney and Dublin, Ireland)**



<p>Saturday, April 26</p> <p>Sunday, April 27</p> <p>Monday, April 28</p> <p>Tuesday, April 29</p>	<p>Departure from the United States</p> <p>Arrival in Shannon, Ireland. Travel through the Irish Country; visit Bunnratty Castle and St. John's Castle in Limerick en route to Killarney. Take in your first views of the majestic countryside before checking into hotel. Welcome reception and Dinner at local restaurant.</p> <p>See Irish scenery at its most stunning, including the Ring of Kerry with its rugged coastline, heather and beautiful Lough Leane. Dinner on your own.</p> <p>Today hop on board a Jaunting Tour to Muckcross House, a stately Victorian home with magnificent gardens and breathtaking views of surrounding lakes. Return to Killarney for Dinner and an evening of traditional Irish Storytelling.</p>	<p>Wednesday, April 30</p> <p>Thursday, May 01</p> <p>Friday, May 02</p> <p>Saturday, May 03</p>	<p>Depart Killarney and journey to Dublin. Acquire Ireland's famous eloquence as you visit the Blarney Castle, where those that wish to gain the "gift of gab" can kiss the Blarney Stone. Travel to Waterford to visit the Waterford Crystal Factory. Continue to Dublin. Dinner on your own.</p> <p>Morning sightseeing tour of Dublin with a local guide, including entrances to St. Patrick's Cathedral and Trinity College, home to the Book of Kells. Dinner on your own.</p> <p>Free day in Dublin for shopping or additional museum visits. Group leader will provide travelers with information on "what to do in Dublin." Say farewell to the Emerald Isle with a special Irish Night including a group dinner and entertainment this evening.</p> <p>Transfer to airport for return flight to the United States</p>
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**Note: Airfare and Hotel (double room) with daily breakfast is included in this price as well as all of the tours above.**

**Fees:** Departure from DFW and Houston is \$3,164.00 (includes Departure tax and non-refundable Registration Fee of \$300). The above is the cost to travel roundtrip from DFW and Houston. Department from Austin and San Antonio is \$3,264.00 (includes Departure tax and non-refundable Registration Fee of \$300). Upgraded insurance can be purchased: Comprehensive - \$120 and Ultimate - \$200; Over 66 – Comprehensive - \$220 and Ultimate - \$300 (insurance covers the entire eight days of travel). Tips for tour guide (\$4 per day) and bus driver (\$2 per day while using bus) is not included. Small contingency fee may be added in January 2008 for fuel surcharge. **Fees based on 20 persons.**

**Payment Schedule:** **Deadline for registration is October 1, 2007;** Initial deposit is \$300; second payment of \$300 is due 45 days following registration payment; balance due on January 27, 2008. **Sign up by July 31 and save \$100.**

Register at [www.ACIS.com](http://www.ACIS.com), by selecting the ENROLL NOW tab on the top left above the logo on the home page, choose participants, and sign in using: Group Leader ID: 91260 Group Leader Last Name: Hackler

rich and highly configurable program. However, I wouldn't tackle setting it up myself. Amicus, on the other hand, (at least Version 5+ ) is simpler to install and configure. Time Matters has a longer learning curve because of a less intuitive interface. Once it's installed and everyone gets up to speed it is a great program.

Amicus has made a couple of attempts in the past few years to add new features with new versions of their software. Their first try at an upgrade was Amicus X, a product with a web based interface that was supposed to be accessible over an Internet connection. The product was a disaster. Amicus followed up with Version 7 and had mixed success. The initial release of the product was buggy and sales were slow. Version 7.1 cured many of the problems and I've generally heard good reports about it. However, my experience and that of several colleagues has been that Version V+ was the best software ever released by Amicus.

Version V+ , I'm told, is based on the FoxPro database engine while Version 7 is a complete revision based on Microsoft's newer SQL Server. The software thus required a complete rewrite and the kinks have been slow to resolve. There are benefits to the SQL platform but not if the rest of the software doesn't work correctly.

Version V+ lacked some useful features that competitors long ago added. I had hoped that Amicus would someday upgrade that version but I had heard from consultants that Amicus had decided to phase out support of Version V+. All of a sudden a brochure arrived at my office today offering Small Firm Addition 2008, which is basically V+ with a lot of the features I have been wanting.

Small Firm Addition features an improved interface similar to that of Version 7 with a row of buttons on the side of the screen to make navigation through the program easier. One great new feature is an improved task management module. According to the literature, tasks assigned out to others can now be monitored through Amicus. It was difficult to do this in the original V+ and I ended up making a task entry to remind me to follow up on the task I had assigned. And, if you don't like the way Amicus keeps up with tasks, Version V+ Advanced Edition users will now have full Microsoft Outlook synchronization so that tasks, as well as contacts and calendar setting entered in Amicus will automatically be synced with Outlook and will appear there, and vice versa. You can use great task management features in Outlook and changes will sync back to Amicus. Also, a PDA can be synced with Outlook rather than directly to Amicus so that a PDA other than Palm products can now be used with the Advanced Edition. Basically, if the PDA can be synced with Outlook you can get your Amicus calendar, tasks and contacts on your PDA.

Some of the less complex but still handy changes include real time spell checking; auto text for inserting frequently used words and phrases; an explorer view of documents;

and automatic email signatures for messages sent from within Amicus.

Amicus recommend the Small Firm Addition for offices with under ten users. That will be sufficient for most solos and many small firms. The hardware requirements are modest. Also, the upgrade price is affordable. See [www.amicusattorney.com](http://www.amicusattorney.com) for details.

*E. G. "Gerry" Morris is a solo practitioner and has practiced law for over 28 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](http://www.egmlaw.com). Email your comments and questions to Gerry at [tech@egmlaw.com](mailto:tech@egmlaw.com) .*

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## Law Practice Management Tip

**Management Tips are provided by the 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.**

If you are a solo practitioner or an attorney in small firm, consider including language in your client contract / fee agreement, notifying the client of the necessity for a backup attorney to fill in for you should you become incapacitated for some reason and not able to continue representation.

An attorney is human, meaning that he / she is just as vulnerable to illness and accidents as any lay person. That being said, you want to make sure that should you ever be put in this position, you're clients will be taken care of. Speak with your colleagues and ask if they would be willing to pinch hit for you should there ever be a need.

Once you have a designated backup attorney(s), let your clients know during their initial interview that you have agreements worked out with other attorneys to fill in for you, should something prevent you from continuing representation. Include this information in your contract and / or fee agreement and make sure the client understands and agrees to it.

## Upcoming Events

**The (Almost) Paperless Criminal Law Practice and Trial Presentation Technology** is scheduled for video replay in Dallas October 16, 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=7272>

**Legal Support Staff Training Seminar (No MCLE)** is scheduled in Corpus Christi October 18, 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=7404>

**Disaster Preparedness: Securing the Firm** is scheduled in Corpus Christi October 19, 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=7403>

## Law Practice Management Webcasts

**Legal Staff Strategies: Hiring and Firing** is scheduled for September 19, 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=7409>

Your legal support team can either be a hindrance or an asset to your practice. This webcast will explore techniques to use in the hiring process to help you better select your employees and, will also examine the proper channels to take when an employee is not working out and must be terminated.

**Moderator:**

Philip Mack Furlow, Denton  
Hayes, Berry, White & Vanzant, LLP

**Panelists::**

Francine Breckenridge, Austin  
Strasburger & Price, LLP

Melanie Carstarphen, Austin  
Legally Large

**Alternatives to Hourly Billing** is scheduled for October 23, 2007 from 12:30 to 1:30 pm. More details soon, see [www.TexasBarLPM.com](http://www.TexasBarLPM.com) and click on "Webcasts".

## Law Practice Management Special Offers

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This revised and updated Third Edition of Anatomy of a Law Firm Merger by Hildebrandt International provides you and your firm - no matter what size or type of practice - with the expert advice on what you need to consider when contemplating a merger, and how to successfully make it happen. It features a completely updated financial perspective for today's changing financial picture, plus a revised discussion of the economic balance sheet - to help quantify the value each firm brings to the merger. In addition, there is all-new material on integrating hard assets into the merger, and newly updated technology information.

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