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A NEWSLETTER PROVIDED BY THE LAW PRACTICE MANAGEMENT PROGRAM OF THE STATE BAR OF TEXAS

### THE TECHNOLOGY ROUNDUP

Gerry Morris, J.D.

#### Stuff I Use Every Day

I've written about a variety of hardware and software products over the past couple of years. I've mostly written about gadgets and applications that either I or a close colleague use so that I can give you a first hand review of how it does or doesn't work. Some of the products I've written about are now gathering dust somewhere, but there are a few that I've come to depend on to help me run my practice and my life in general. This month I want to briefly recap some of my past reviews and add one or two new ones to make up an all-star list of ten useful products. These products, listed in no particular order, are the stuff I use every day and recommend. Some are pricey, but some are inexpensive or even free.

#### 1. Amicus Attorney Small Business Edition.

This is the practice management software application I use in my office. I chose it over its competitors because the graphical user interface is the most intuitive in the field. It does everything I need it to do in my small firm practice and is extremely user friendly. I've also found it to be very reliable. You might also take a look at Time Matters for larger installations or more sophisticated functionality.

**2. Google Desktop.** I thought I would throw in something that is absolutely free. This program can be downloaded from, where else, Google.com. This desktop search engine indexes everything on your network and desktop PC much as Google's Internet search engine

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### THE COACH'S CORNER

Debra Bruce, J.D.

#### Learning from Our Mistakes

A wise person said, "A mistake is not a mistake unless you fail to learn from it." I made my share of mistakes in my legal career, and here are a few I learned from. I thought I would offer you the chance to learn from some of mine, instead of making them all yourself.



#### 1. Viewing speaking and writing as non-billable time.

It is true that we usually can't bill anyone for those activities or the preparation time required. When I looked at it that way, however, I tended to de-value the activity, and put it behind everything else. Of course, that means I didn't get around to developing talks or writing articles that would showcase my expertise and expose me to new contacts. The wiser course would have been to view those efforts as important business development activities, so that I would give them the appropriate emphasis.

#### 2. Focusing on prospective clients and not on prospective referral sources.

As a corollary to the first law practice management mistake described above, I didn't take advantage of opportunities to speak to audiences full of referral sources. At a time when I represented small businesses, the managing partner of the regional office of a large national insurance company asked me to give a talk to their sales stars about shareholder agreements in closely held organizations. I never got around to it. I saw it as a favor to them and I didn't recognize that they would be highly motivated to act like my free sales force convincing business owners that they needed shareholder agreements backed by key-leader life insurance. I didn't recognize the opportunity, even though I had seen how an initial small project could develop into a significant long-term client. When those life insurance clients didn't like their existing counsel, or needed a referral for other reasons, I would have been the corporate lawyer all those sales people knew to

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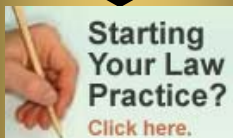
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click here for helpful  
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to aid you in starting  
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indexes all the materials on the gazillion web sites on the World Wide Web. Type in what you are looking for in the program's search box and, in less than a second, a list appears in a browser window with links to every relevant document, email, chat or previously visited web site. It's amazing.

**3. Splash ID.** This program works with my Palm Treo. The product includes a desktop application and an application for the handheld. This program is basically a small database in which I enter all my web logon information, my credit card and bank account numbers, my wife's clothes sizes, my frequent flier account numbers and so on. I can enter them in the desktop application and sync the information to my Treo. Splash ID allows me to carry with me all the information that I may need to get through a busy day of logging on, checking in, and paying up. Of course, all the info is password protected so I can safely keep it all in one place.

**4. Publicdata.com.** This is an online service that allows me to search driver's license records in several states by name. There are also criminal records from several jurisdictions and a few state's DMV records. The service costs a few cents a search but is well worth the meager cost. Not a day goes by that we don't have occasion to find a current address for a witness or someone otherwise connected with something we're working on.

**5. Paperport.** The document management program interfaces with our scanner and allows my legal assistant to drag and drop scan documents into Amicus Attorney. On each of our desktops we use Paperport's stack and unstack feature to manipulate scanned documents. We can separate documents into individual pages, combine documents and turn scanned documents into fill-in-the-blank forms. We also use Paperport to convert documents into Adobe Acrobat pdf format.

**6. Fujitsu sheetfeed scanner.** The exact model of Fujitsu scanner I use, the 620C, has been out of production for some time. If the two I have ever wear out I'll replace them with the current model. However, I don't think that will happen anytime soon. These scanners operate at about 20 pages

per minute and work flawlessly. We go months between paper jams and when they do occur, it's usually because of a paperclip or staple. Speed is important but reliability is paramount. It doesn't do any good to have a 50 page per minute scanner if the sheet feeder jams every 25 pages. From what I've read and heard, the newer Fujitsu models have carried on the tradition.

**7. Palm Treo 755p.** Apple iPhones are sexier, Blackberries are all the rage, but I prefer my Treo. The palm operating system enables me to take advantage of the thousands of low cost applications such as Splash ID mentioned above. I can create and edit Microsoft Word Documents and Excel Spreadsheets. I can even view PowerPoint presentations. I can listen to music on a MP3 player and to unabridged books downloaded from Audible.com. I can receive and send email when I'm out of my office. Of course, the standard calendar, contact and task functions are included and the Treo syncs with Amicus Attorney without first having to sync with Microsoft Outlook. My new 755p has more built in memory than its predecessors and a faster processor. Treo's market share is declining but, for me, it's still the best smartphone available.

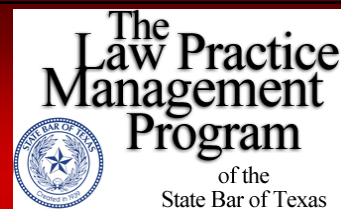
**8. Audible.com.** This one is purely for entertainment. Audible.com is a wonderful web site where, I can download to my computer and ultimately on to my Treo, any one of thousands of popular books ranging from the classics to today's best sellers. The membership fee is about \$16.00 per month which entitles me to two books per month with no further cost. If I want more books than that, additional ones can be purchased. I can knock out the average book on about 4 or five trips to one of the surrounding counties for court appearances. However, something like the unabridged version of Moby Dick took about nineteen hours of total listening time. Audible.com is well worth the price.

**9. Onlymyemail.com spam blocker.** This is a web based spam blocker which means that it retrieves your mail from your ISP, filters it, and then delivers it to your desktop. All the spam is retained off site. After I wrote about this service several months ago, I received several favorable emails from readers who tried it. There are a couple of downsides. If you sign up for the basic version for \$4 per month, there is about a 5 minute delay from the time your ISP receives an email until it reaches your

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## Online Learning for Legal Staff Professionals



<http://www.360training.com/texasbar/>

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recommend.

**3. Not networking enough with lawyers in other practice groups.** As an associate in a large law firm, I billed a lot of hours. Although I liked getting to know the other attorneys, I had my nose to the grindstone so much that I rarely ventured to the other floors. As a partner, even in a smaller firm, I had many additional duties and tended to focus my networking outward. In those years I got a myopic view of firm politics, and missed a lot of opportunities to build or strengthen valuable alliances. Life in a law firm can have striking similarities to the reality television show *Survivor*, where alliances play a crucial role.

**4. Training one subordinate after another on the same thing.** The work in a law office requires smart people at all levels, so lawyers tend to develop people-dependent practices. People smart enough to be good lawyers or good legal support staff have multiple employment opportunities, however. As a result, many law firms today experience a lot of turnover. Illness, life changes, or even advancement within the firm can trigger the need to train replacements. After suffering through temporary employees and new trainees a few times, I learned to ask the people I supervised to develop a desk manual respecting their responsibilities. For any redundant work, the manual set out detailed explanations of the procedures involved and the location of the useful or necessary resources. I also established indexed form banks that I could point people to. That made my practice more system-dependent and less people-dependent. I got higher quality product from my direct reports, I spent less of my own time in the delegation process, and I didn't get crippled when the inevitable turnover occurred.

**5. Working myself into poor health.** The ranks of lawyers include a lot of workaholics, and I've been one of them. When the law firm culture rewards martyrdom in the name of client service or higher revenues, lawyers may fail to recognize the true price they pay. Until I learned to establish some boundaries and engage in self-care, I went into the hospital twice during one pregnancy due to overwork; I allowed a cold to develop into bronchitis and then pneumonia; I experienced a period of excessive weight loss; I missed out on a great vacation that I regretted for years; and once I fell asleep at a stop light while driving home from work. I have not even mentioned the impact on my most important relationships. Looking back on those days from the maturity of my years and the vantage point of experience, what I gained was not worth what I lost.

**6. Telling an experienced assistant how I liked things done without asking her how she liked to do things.** When

I joined a new law firm, I blew it on the very first day. As a result of that faux pas, we got off to a bad start and I experienced a lot of passive-aggressive foot-dragging and low quality work product from a very competent staff member. If I had started out by asking her how she suggested doing things, I might have learned a few new ideas. There would be plenty of time later to develop a working methodology that satisfied us both. I would have had a more willing guide through my initiation at the new firm, and I definitely would have saved myself a lot of frustration over the next few months.

These are just a few of the mistakes I made over the years. I invite you to share with me some of your experiences of "learning the hard way." I suspect that together we could have enough fodder for quite a few more columns.

*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

*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.*

After the initial client interview, it is a good idea to make a copy of the client contract and fee agreement for the client. Give it to the client in a folder along with a firm brochure. This will serve two purposes - first, the client can then file any documents related to his / her case that you may send their way during the course of representation and two, should the client have any questions related to the scope of representation or any questions regarding billing, all the information they need is in that folder. In addition to this, the client will feel like they did not leave your office empty-handed when they walk out with their own "file folder."

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## Upcoming Events

### **SAVE THE DATE! 1st Annual Law Practice Management Program 2-Day Course**

**“Nailing It: The Tools You Need for Today’s Practice” May 15-16, 2008**

is scheduled in Irving at the Sheraton Grand Hotel DFW Airport

Nailing It is the first-ever program of its kind produced by the State Bar of Texas - 2 full days of practice management education! Learn tips and tricks to help streamline your management practices and increase efficiency in your office from experts from across the state and country. This program will tackle issues such as alternative billing methods, improving productivity, technology trends and much more.

For more information or to register, call 800-204-2222, ext. 1574 or visit:

<http://www.texasbarcle.com/CLE/AABuy1.asp?sProductType=EV&IID=7804>

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desktop. The advanced version for about \$30 per month eliminates this issue. Also, the basic version has an attachment size limitation. I suggest creating a second email account on your ISP strictly for sending and receiving large attachments.

**10. Brother HL-5250DN Laser Printer.** For years I was strictly a HP devotee when it came to laser printers. They were as reliable as the sunrise and the consumables were widely available. I occasionally strayed to try some new brand and always regretted it. However, after reading several reviews of the Brother HL 5250DN, I decided to give it a try. The twenty something page per minute, (Brother says thirty) dual sided, three paper bin (on the model I have), networkable printer performs like a champ. All of our PCs are connected to it via our network, which means that there is no dedicated printer server PC that must remain turned on. The print quality is excellent and the consumables reasonably priced and easy to find. The purchase price for one complete with extra paper trays is around \$260.

Thank you for the kind reviews several of you have given me about this column. I always enjoy the feedback. I also enjoy hearing about technology you use in your offices.

*E. G. "Gerry" Morris is a small firm practitioner and has practiced law for over 29 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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Strengthening Your Firm addresses what to do after your practice is up and running. Perfect for lawyers who want to ensure the success and well-being of their practice, this book is best described as an owner's manual for the law firm in the 21st century. It will help firms of all sizes recognize and implement the changes they need to make in order to continue to survive and thrive.

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