

# THE PRACTICE MANAGER

## MANAGING YOUR REAL ESTATE PRACTICE IN A CHANGING MARKET

JULY 11, 2008 - VISIT

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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.

#### Once Again, A New Version of Amicus Attorney

I have written several articles about the case management software offered by Amicus Attorney. I'm very familiar with the company and some of its products because I've used one version or another in my office for over 5 years. I started with Amicus Attorney version V, upgraded to version V+, and currently run the Small Firm Addition for the three lawyers and two full time staff members in my firm.



Along the way, I've resisted the temptation to upgrade to the first iteration of a new version of the product. I chose not to upgrade to Amicus Attorney X, the first web based version, and Amicus Attorney 7, the first version based on the Microsoft SQL data base technology, mostly because the postings on Amicus' user forum were strongly negative about the products. Amicus Attorney X turned out to be a disaster for the company and severely damaged its reputation among its customer base. It followed up with Version 7 which was apparently released too early, judging from the number of bugs that inhabited the application in its first release. An upgrade a few months later addressed many of the problems, but more damage had been done.

Finally, Amicus Attorney employed a time honored troubleshooting procedure. When things wouldn't work after

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### THE COACH'S CORNER

Debra Bruce, J.D.

#### Delegate What You Hate

An attorney coaching client recently asked for help with delegation skills. He had read my December 2004 article on delegation originally published in *The Practice Manager* (now available at <http://www.lawyer-coach.com/raisingthebar/index.php/2004/12/01/delegation-a-powerful-time-management-tool/>). He still had a hard time letting go. He realized that his concern was not so much *how* to delegate as *what* to delegate.



There are two important questions to ask yourself in order to identify tasks and projects to delegate: "What do I dislike doing?" and "Are there elements of the work I'm doing that don't require my level of education and experience?"

Let's look at each of these in turn.

#### 1. *What do I dislike doing?*

If you can find a way to delegate the tasks and projects you dread doing, you will see a leap in your productivity and income. If you don't like to do it, chances are it's not in your sweet spot of skill and talent. We usually enjoy what we're really good at. Find someone who likes to do that kind of work, and give yourself permission to focus on what you enjoy. Although you may feel anxious if that requires you to incur additional expense, you'll gain more energy to complete the projects in your sweet spot, as well as marketing time to garner more of them. You'll enjoy your work more, and your enthusiasm will be attractive to clients. Your clients will be happier and more likely to make referrals when you have shorter turnaround times (because you don't procrastinate as much) and more acceptable bills (because you're more efficient or get better results at what you do best).

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*The Practice Manager* 1



Law Practice Management  
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The Practice Manager  
is a newsletter published by  
the  
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of the State Bar of Texas.  
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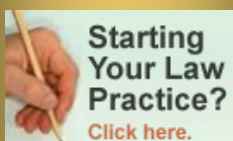
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changes were made, it went back to what worked before the changes. Amicus Attorney Version V+ was a good program. The problem with it is that it is based on the aging FoxPro database technology. This presented programmers with limitations for future improvements. The new SQL technology is all the rage, but, Amicus Attorney just couldn't get right the new versions based on this more versatile engine. In order to keep its current customer based happy (me, for instance), Amicus Attorney released a new version of its product that amounted to Version V+ with several new features. I upgraded to Small Firm Addition and have found it to work flawlessly. The chief reason I upgraded was the addition of a much improved task module that allows be to see the tasks assigned to other members of my firm. That allows me to monitor the tasks I've assigned. Frankly, it's still not as good as the task features in Outlook, but it will do.

In March of this year, Amicus Attorney released Amicus Attorney Premium Edition. This version is another SQL based application that allows unlimited users, (as opposed to the 10 user limit of FoxPro based Small Firm Edition). The feature list of the product ([www.amicusattorney.com/products/prod\\_edition\\_comparison.html](http://www.amicusattorney.com/products/prod_edition_comparison.html)) shows traditional Amicus Attorney modules plus structural features designed for larger applications. Amicus represents that the Premium Edition can be configured for access over the Internet, a feature that Amicus has tried to implement in Amicus X and Version 7 with limited success. The new version also incorporates Citrix/ Terminal Services Support.

Scanning the user forum postings, it appears that this product has been fairly well received. The negative postings complain of rather minor installations issues that appear to be more operating system related than attributable to Amicus. One poster complained that this release seems to just be Version 7 with all the bugs fixed. If so, it would seem to be worth the upgrade, given the spotty record of Version 7.

I've written several times about why I like the general setup of Amicus Attorney. The program uses a graphical interface that is extremely intuitive. Each case file is viewed on the screen as an image of a manila folder with clasps holding pages containing contacts, events, accounting information, document links, etc. The training time for new staff is minimal, and someone of just about any level of technological savvy can work with it. The calendaring works flawlessly across all users. The new version of Professional Edition contains several features that provide more convenience than my Small Firm Edition. For instance, there is a "Favorites Module" that allows a user to make shortcuts to frequently visited locations in the program. There is the ability to log on from any workstation in the firm, because the program uses a "thin client" workstation application that has minimal data stored locally. There is the ability to relate documents to contacts as well as files. There is also better integration with Microsoft Office including dynamic linking to documents.

The Professional Edition is intended for larger installations and its price reflects that market. For new installations the first license costs \$699 and each additional license \$599. An upgrade from Version 7 runs \$249 for the first license and \$199 for each additional license. Upgrades from Small Firm Edition or Version V+ go for \$349 for the first license and \$299 for each additional license.

Before buying Amicus Attorney 2008 – Premium Edition, I would contact a consultant that works with case management software to learn what users of the product have experienced. Given Amicus Attorney's struggles in recent years to produce a thin client, SQL based product, I would be cautious. However, initial signs are good for this version.

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

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Some lawyers feel guilty about delegating what they consider undesirable work. Remember the aphorism "one man's trash is another man's treasure." I conducted a workshop for a working team to help them communicate more effectively and distribute the work load optimally. I asked each team member to tell us what aspect of their work they liked the most and which tasks they liked least. When one person described her "grunge work," another piped up, "I'll take that on. I actually like doing that." The work you dislike is perfect to delegate, to the right person.

### **2. Are there elements of the work I'm doing that don't require my level of education and experience?**

Delegate to the lowest level possible on the totem pole to optimize the usage of resources and provide developmental opportunities to your people. Even if most of the projects you work on require the judgment gained through years of experience, at least some portion of each project can be delegated. Think about what you tackled when you were less experienced, or even a beginner.

You may need to make your delegation gradual in scope, providing projects that are challenging, but not daunting. Give your delegates as much as they can handle. Ask *them* what they think they can manage.

Developing the skills of your team may require a greater initial investment of your time than doing it yourself, but you will reap the reward of freeing up more of your time in the long run. Be sure your instruction includes details about the purpose and desired outcome of the project, to foster their good judgment in future projects.

### **Mechanism for Identifying Tasks to Delegate**

To determine the appropriate tasks for delegation, rank your outstanding tasks as to level of skill required and your interest level; then insert them into a graph similar to the one below. The shaded cells will indicate the optimal tasks for delegation.

<b>SKILL LEVEL</b>	High			
	Med			
	Low			
		Low	Med	High
<b>INTEREST LEVEL</b>				

### **Additional Task Identification Guidelines**

If you still need guidance on what tasks to delegate, here are some additional guidelines.

1. If you have trouble starting things, ask someone else to take a first crack at it, then you can edit and finalize it. If you are a good starter, but tend to lose interest before you get finished, find an organizer type who likes to pull things together and put the finishing touches on them once you get them headed in the right direction.
2. Delegate tasks you don't know much about. For example, let someone else in your office conduct the preliminary research on reviews of software, cell phones or office equipment. You can provide guidance by listing out the dream functions and features you would like to have in the product.
3. Delegate tasks that require substantial knowledge outside your sweet spot, unless you want to become an expert in that area. Associate a colleague to answer the tax questions if you are a real estate lawyer. If you are a personal injury lawyer, bring in a corporate lawyer along to feed you questions in that deposition where you are trying to pierce the corporate veil. Call in an IT specialist to get all your computers and software programs talking the same language.

*See Coach's Corner on page 4*

## UPCOMING EVENTS

### What Was I Thinking?

**Estate Planning and Probate Practice Management:  
Tips and the Top Ten Things to Avoid**

June 10, 2008

6:00 - 8:00 p.m.

Dallas, TX

Westin Galleria Hotel

\*Client Relationship Building/  
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\*Financial Management and Billing Practices

\*Using Technology and Tools to Manage Your Practice

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4. Delegate anything you can systematize, especially if the work is redundant. If you can construct written instructions to cover most contingencies, you should be able to get back a quality product with very little additional time investment on your part. You can probably have experienced subordinates create the bulk of the instructions by writing down in detail what they do. In a similar vein, create scripts to guide staff for common emails and telephone conversations and check lists for information from new clients or for finalizing ordinary transactions.

5. Delegate as much non-billable work as you can, but recognize that there are important non-billable tasks that you really must do yourself. It's mainly up to you to nurture strong relationships with your best clients, and to review your monthly financial statements, for example.

6. Delegate decisions that have manageable risks, especially if they are time consuming. Let someone else make your travel arrangements, order office supplies and equipment, set deposition schedules, and manage your calendar.

7. Delegate tasks for which instructions are available elsewhere, such as in filing guidelines, bylaws, rules and regulations, owner's manuals, procedural manuals and on the Internet. You can give a final review, if necessary for your comfort level.

8. Delegate as much responsibility as possible. Don't delegate tasks that are critical to long term success and that need the judgment of your experience, however, such as which expert to designate in a major case, or whether to render an opinion on a dicey securities law issue.

9. Don't do what someone else would be willing to do for you. Delegate anything that will make your job easier or your life more pleasant, while still maintaining necessary quality levels. Be willing to accept "good enough" while someone is still learning. Recognize the value of the tradeoff between perfection and your freedom.

10. For successful delegation, make sure your delegates have available what is required to do the job. Do they have sufficient authority, time, people, equipment, materials, introductions, information, cooperation from peers, respect and the appropriate location?

If you still have trouble with delegation, perhaps a coach or other objective observer can help you recognize what the real block is.

*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).*

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### BOOKS OF THE MONTH

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Sale Price - \$69.95

Most lawyers know intuitively how important timely access to the right information is to their work. On the other hand, most lawyers have little or no knowledge or interest in filing systems and methods, indexing, database architecture and other mundane issues that enable records management as a practice tool. This book is intended to address the issues arising from the need to manage records and information in a law office.

#### Making Partner: A Guide for Law Firm Associates

Regular Price - \$59.95

Sale Price - \$41.95

Becoming a partner in a law firm is a goal of many lawyers—an upper rung on the ladder of success. Most lawyers think they will make partner eventually, but in reality, many never reach this level. Do you know what you should and should not be doing? Do you really know what your chances are at your firm? Now, you no longer have to rely only on observation and gut instinct to take those next steps up. This concise, straightforward book looks at all the variables and provides detailed advice on how to create your own strategic plan for success.

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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 not already using a fee agreement in your dealings with clients, you should start using one immediately. The fee agreement will help set out your expectations of the client regarding your bill and will also let the client know how and when to expect your bill. You may contact our office for a sample fee agreement.