



Greetings Fellows!

The Board of Trustees met in Denver on January 14 to consider nominations for the class of 2006 Fellows. Some excellent nominations were received and easily approved. We are very pleased with the impressive group that will be invited

to attend the induction ceremony at this year's annual meeting in San Francisco.

On the other hand, there were a small number of nominations that the Board was not able to approve. This is always a frustrating experience for all involved – particularly for those who prepare the nomination packet. But the truth is that, frequently, when the Board declines a nomination it is due only to insufficient information being provided to them – and is ultimately no reflection on the actual quality of the nominee. When a nominee is unknown to members of the Board (an assumption all nominators should make), and there is insufficient written evidence that the individual has made significant contributions to the field of law practice management, there is no alternative but to reject the nomination.

In this newsletter, you'll find an article with some tips on how to complete a successful nomination. Please take a look at it and help us to avoid disappointments in the future.

Special points of interest:

- Tips on Nominating Candidates
- Annual Meeting in San Francisco.
- Becoming A Google Power User
- Personal Insights

IN THE FUTURE

The Board's agenda included several other items of interest:

- The 2007 Annual Meeting and Induction Ceremony will be held at the Four Seasons Hotel in Philadelphia on September 7 and 8.
- The InnovAction Awards program will continue on a slightly different schedule. The next round of consideration will be launched at the annual meeting in San Francisco this September 8 and 9.
- A new College logo is being developed pro bono by Greenfield/Belser Ltd. (Thank you VERY MUCH to Fellows Burkey Belser and Donna Greenfield!)
- Hubbard One is creating a new College website with greater functionality and . . . well. . . energy! This work is being performed as an in-kind contribution, as well.

NOTE TO FELLOWS: Your involvement in the work of the College is actively sought. If you or your organization are interested in contributing goods or services to the mission of COLPM, contact Silvia Coulter, Chair of the Development Committee (scoulter@legalsales.org), or me (mtarlton@jcfkk.com).

Merrilyn Astin Tarlton, President

Editor's Note

Welcome to the winter issue of the College of Law Practice Management newsletter. Read about new and long-time colleagues; get an update about the College's activities; plan now for the annual meeting in one of the world's most wonderful cities; and consider contributing to the College's work by doing more than just being a Fellow.

We hope you will consider becoming a Sustaining Fellow – this extra contribution from many Fellows helps support the College

beyond what our dues cover. It also has allowed many other Fellows to honor or recognize our mentors and supporters. As you read through the list of Sustaining Fellows, please take note of who some of them have honored. All of us can make this contribution more meaningful by making it in the name of someone else.



Mary Beth Pratt

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Editor's Note cont.

I also urge you to consider contributing to the "news." Let Karen (colpm@comcast.net) know what you are doing; send her change of address or position information.

If you would like to write an article, please let me know— send me an e-mail mbpratt@mbprattconsulting.com with your proposed topic so that Karen and I may plan the schedule for future newsletters.

Some topics to consider:

- Have you retired recently? Many of us have, including me. Our reasons are varied – desire to have more control over one's schedule; to spend time with family;

to try something new; to experience life at a different pace. What tips and suggestions can you share with other Fellows?

- Trends in law practice management: What's new (if anything)? The accumulated wisdom of the Fellows is monumental, and we need to find more ways to share it with up-and-coming leaders. And, they have experience that we never dreamed of – how can we all take advantage of this brain trust?
- Other topics: What do you want to read about? We look forward to your ideas.

Thanks. Mary Beth

Newsletter Committee

Mary Beth Pratt, Chair

Simon Chester

Bob Denney

Jan Waugh

How To Present Candidates for Nomination Effectively: Tips For Success

By Simon Chester and Merrilyn Astin Tarlton

One of the best things about belonging to our College is encountering people who've made extraordinary contributions to the profession of law practice management and who we might never have met if not for the College.

And, one of the most rewarding and difficult tasks of the Trustees is to assess nominees for induction into the College. We assess achievements against the criteria for fellowship and have spirited discussions about all candidates' merits. Our information source is the nomination form you complete when nominating a prospective Fellow. Trustees can't know every candidate. Your nomination form may be all we have.

The Trustees take the nomination process very seriously. Some candidates advance and other nominations are declined. Here are some tips for an effective nomination.

- Read the criteria and follow the nomination form very carefully. It's a roadmap to present your candidate's merits – make sure that every element is covered.
- The Ten-Year Test. It's a requirement that a candidate's contribution be documented over a full decade. Be sure to include objectively verifiable facts that show your candidate meets this test. The easiest way is likely to be some writing, an appointment or a speech.

- This College is dedicated to honoring achievement in law practice management. To be a leader means that the nominee has shared his or her knowledge with others – that's what leadership is. Normally, a candidate will have a distinguished record of publications and speaking to professional groups as well as service to organizations. Often, Fellows have made significant contributions to the community and been visibly successful in the practice of law or business. Keep in mind that what we honor is your candidate's contribution to the field of law practice management (there are other Colleges that recognize distinguished legal practice).
- Ask yourself why your candidate is special. While you know it's true, we may not. What contribution has he or she made that was special, unique or innovative? Communicate your enthusiasm for the candidate by articulating that special element in one paragraph for the inscription that's read when the candidate is inducted. This must capture why the candidate deserves the honor of Fellowship (because it is an honor).

Visit our website at
www.colpm.org

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How To Present Candidates for Nomination Effectively:

Tips for Success (con't)

- Go beyond the bare bones of a formal resume. Give us a sense of the candidate as a human being, as a colleague, a friend, a mentor. Google your candidate and supplement the résumé with more information. If the candidate really has made an extraordinary contribution, we would expect it to show up on public records accessible over the Internet. If your candidate has a Web site, look closely at it; if she or he is a lawyer, take a look at biographies in legal directories like Martindale-Hubbell or Findlaw. If you've access to a law library, run searches in LegalTrac or *Index to Legal Periodicals* to turn up old articles by your candidate.
- If you can't find information it may mean that the candidate doesn't yet have enough experience to be eligible. It's also why finding the right Fellow to second your nomination is crucial; others have information that you don't have.
- Should you or shouldn't you ask your candidate for help in assembling the information? It's up to you: there are good reasons not to (and, you can often enlist a colleague of the nominee to help gather information). Since there's no guarantee that any nominee will be admitted, it's tough to explain to a friend who you've advanced that they've been unsuccessful. And, it can be a lovely element of surprise when you tell your nominee for the first time that he/she has been elected.
- Avoid trivia. Exceptional candidates have exceptional profiles. You may find pages and pages of background, and we need relevant facts to help assess the merits. But it's unlikely that the entire package need be more than a dozen pages. Select only the key pages from a Web site; provide a selection of highly relevant articles, not the entire list of the candidate's writings or speeches.
- Don't underestimate the time it will take you to assemble the candidate's package. The deadlines sneak up - it's not too early to begin thinking about next fall's nominations!

Thoughts of San Francisco—Annual Meeting September 8 & 9, 2006

The College Annual Meeting returns to San Francisco this year. The Palace Hotel originally opened in 1875 as the world's largest and most luxurious hotel. The fire and earthquake in 1906 gutted the hotel, and it was re-built and re-opened in December 1909 at a cost of \$10 million. Its garden court is the only interior site that is named as an historic landmark in San Francisco. Please mark your calendars now and plan to be there in September—one of the most beautiful months of the year in the city by the bay.

Everyone who has been there has special memories of the city – here are some of mine...celebrating a special one-year old's birthday along the waterfront with a street musician singing a special version of "Happy Birthday." Giving my shoes to the overnight shoeshine service at a famous hotel on top of Knob Hill and never getting them back (but I still love the city). Walking while I eat a crab cocktail. My husband's trip to Alcatraz to see where the "Birdman" really lived. Muir Woods...maybe if we locked the world

leaders inside it, they would decide how to achieve world peace. The drive to Carmel, Pebble Beach and Monterey, and the aquarium. The food...

Please help us entice as many Fellows as possible to the meeting. E-mail Karen Rosen at colpm@comcast.net with your favorite memories of San Francisco, including the College's first meeting! We will use them in upcoming issues of the newsletter.

Mary Beth Pratt



The historic Palace Hotel entryway, Coit Tower on Telegraph Hill, the Golden Gate Bridge and cable car (clockwise).

Personal Insights—J.R. Phelps

Q: How did you get started in the legal professional?

A: In the fall of 1968, I saw an advertisement for a professional business manager position and, with a growing disenchantment with corporate finance, decided to apply. I had no idea it was with a law firm as I was originally interviewed by an accountant with a large C.P.A. firm. As it turned out, I was interviewing for a position with one of Columbus, Ohio's, largest law firms. Until then, they had used a senior partner's secretary to run things. So at the age of 27, in January of 1969, I became the first administrator at the 60-lawyer firm of Porter, Stanley, Treffinger & Platt.

At that time there was no Association of Legal Administrators, and I had no mentor except for a few other people in Columbus firms. You can imagine my delight when I learned in 1971 that there was an organization forming to support the fledgling occupation of legal administrator. My membership number in ALA was 365. I signed the charter for the Capital Chapter in Columbus, Ohio.

Q: How did you end up with The Florida Bar?

A: In 1980, we were snowed in, and I picked up an ABA Journal and saw an ad for a non-lawyer executive position with The Florida Bar. I joked with my wife about how great it would be to live in Florida and never face another blizzard. I applied and the rest is history.

While my title is Director of The Florida Bar's Law Office Management Assistance Service, I'm what is now referred to in the legal profession as a Practice Management Advisor. The Florida Bar established the first program in the nation. Now nearly half of the state bars, and a number in Canada, have practice management advisor programs. The Florida Bar Board of Governors was convinced that helping lawyers develop business competency skills was a better use of dues than continuing to spend an ever increasing amount to discipline members for poor management. Primarily we function as educators, for established practitioners and newly minted lawyers, teaching the need for business and performance competency skills that enhance overall professionalism.

Q: What has been one of the most surprising aspects of your career?

A: The extent to which lawyers lack grounding in business competency – not only for their own firms, but also regarding their clients' interests.

Q: During your 35-year career, what has changed the most?

A: Technology. Fortunately, from the business management perspective, it started with software that enhanced the ability to get billing and accounting accomplished significantly faster. Today, basic accounting concepts are included in fully integrated time and billing software. Unfortunately, far too few law schools teach anything about the running of a professional service business. Lawyers succeed in spite of themselves, often at a huge cost. The profession has a high suicide rate, job burn-out and an exploding divorce rate. Far too many are caught in the trap of working for the firm, rather than the firm working for them.

Q: What is the most satisfying aspect of your job?

A: Being a Practice Management Advisor is one of the best jobs available in the legal profession. If I could live on ego gratification, I would be the richest guy in the world. The lawyers I've interacted with over the past 25 years have expressed so much appreciation for this service, it's made me try very hard to convince all state bar organizations to start a practice management advisory function. The membership wants and needs this kind of help, and they are so extremely pleased when they find it.

Q: If you were not in the legal profession what would you do?

A: I would gravitate toward a "helping" profession, like medicine or social work. All in all, I'm delighted to be in the legal profession because lawyers help clients resolve deeply personal issues, and I get to play a part in their success.

Q: Where do you expect to be in five years?

A: Although I thought about retiring at age 62, I'm still here, so who knows. When you've got the job you love, why leave?



JR Phelps is the Director of The Florida Bar's Law Office Management Assistance Service. He was inducted into the College in 1997.

Becoming A Google Power User

By Simon Chester

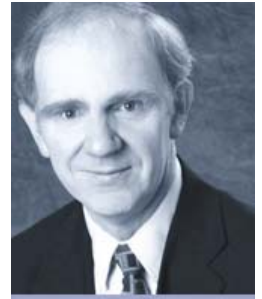
In this column, I will explore some of the features of Google which can make it an even more powerful tool for Ontario lawyers. Many of these features relate to US lawyers as well. Google is the most popular Internet search engine in the world with a 50 percent market share. Everyone can be a smarter Google user by knowing more about Google's strengths and weaknesses – and about some of the innovations that make it an even more powerful tool.

First, the good news. Google has the largest index of web pages available – over eight billion. The bad news – even with that much material, a significant part of the Internet goes unindexed. Simply because Google can't find it doesn't mean that it doesn't exist. Understand that Google indexes just the first 101 KB of a website (or 120 KB of a PDF file), so if a term does not occur close to the front of a long document, it may not be indexed. To be sure of finding the what you need, especially if you need to find Canadian information, another search engine, may be useful, as well. I prefer a free Canadian tool called Copernic Agent which aggregates results from a dozen different search engines.

Part of Google's strength depends on being able to target your searches. I recommend downloading the Google Toolbar which expands your searching options, and let's you search within a website or highlight specific search terms. Smart lawyers look beyond the first few search results, and rerun the search based upon additional terms that are relevant. To become a power user means exploiting the power of the engine to give you feedback and to target sources that are likely to be more relevant to your needs.

Become familiar with Google's Advanced Search feature, which will help you construct sophisticated searches using phrases, and imposing limits on searches. Part of the challenge of Internet-based research is to avoid the unreliable information. The Advanced Search feature will let you restrict your search to pages that have been updated recently, or come from a reliable source (like a government source)- drilling down within a website is a powerful tool. Sometimes you may wish to look for information in a format like Adobe Acrobat PDF, which is likely to be more reliable and permanent.

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Simon Chester is a partner in Heenan Blaikie LLP, in its Toronto litigation and business law groups, with special emphasis on knowledge management, research, and legal opinions. He has been a pioneer over the past 25 years in the application of technology to the practice of law.

College Offers Sponsorships For Annual Meeting, Website and More!

The College of Law Practice Management has created several sponsorship packages for individuals, companies and associations in 2006. It is a great opportunity to support the College while gaining valuable exposure and recognition throughout the practice management profession.

While the sponsorships primarily focus on the upcoming 2006 Annual Meeting, we have two on-going opportunities - website and newsletter sponsors. As our website sponsor, you will be listed on the home page - "powered by xxx", have a hotlink to your website and signage at the annual meeting. With our re-designed website coming soon, this is a great opportunity for a savvy business. Newsletter sponsors receive an acknowledgement in each issue, your logo in the newsletter and signage at the annual meeting.

Annual Meeting sponsorships are vast and benefits include your name on all meeting

materials and signage at the event. Based on your sponsorship level, you may also have the opportunity to showcase your business at the meeting, introduce a speaker and/or distribute materials at the event. Annual Meeting sponsorship opportunities include::

Friday Evening Gathering Reception

Saturday Breakfast for Fellows

Annual Meeting Luncheon

Saturday Night Reception

Induction Dinner & Ceremony

Annual Meeting Entertainment

As you know, we return to beautiful San Francisco in September, the site of the first College Annual meeting, and we are expecting a record attendance.

If you would like additional information on Sponsorship Packages, please contact Silvia Coulter at 978.526.8316, John Cummins at 541.431.1101 or Karen Rosen at 720.271.7015.

If you have not paid your 2006 Fellow dues, please do so by February 28, 2006.

Moved? Changed Jobs? Please let us know by e-mailing the College at colpm@comcast.net

College Recognizes Sustaining Fellows

Please consider supporting the activities and purposes of the College in a particularly meaningful way. Our Sustaining Fellows help us provide programs and services that support the College's mission of recognizing, inspiring and promoting excellence in law practice management. Your tax-deductible donation will help to ensure that we can continue to deliver the programs and services the Fellows expect and deserve.

**We recognize and thank our
2006 Sustaining Fellows:**

Managing Partner (\$500—\$999)

Lowell Rothschild
Harry Trueheart, III

Barrister's Circle (\$250-\$499)

John Cummins, in memory
of David Brazina
Jim Lantonio

Advocate (\$100-\$249)

Robert Bigelow
James Brill, in honor
of J. Harris Morgan
Maggie Callicrate
Robert M. Greene
Peter A. Giuliani, in honor
of Richard Reed
Linda A. Klein
Gerry Malone
Michael E. Palmer
Joel Rose
Robert Rubenstein
Sally Schmidt

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Becoming A Google Power User (con't)

Google also permits you to search Newsgroups back 20 years, or to restrict your search to images. The Google News feature assembles recent news stories from around the world and has recently permitted limited customization. Use Google Alerts to follow stories about client industries and issues affecting clients.

Google Labs is the company's R&D division, and it's come up with some wonderful innovations. The Google Local feature recognizes that I'm in Toronto and floats up results relating to the city. The new Google Maps feature is now my preferred way of getting driving directions – it's also neat to be able to see large satellite images of where I'm going. Google's Translation engine is not going to replace working knowledge of a language but it does provide users with a quick and dirty idea of what a website in another language is about.

I think the future lies in customized searches that recognize who we are and our specific interests. If I'm a lawyer in Ontario interested in a specific industry, Google's experimental Personalized Search feature recognizes that and emphasizes materials that meet that profile – rather than deluging me in American items of marginal relevance.

Two great sources that will keep you on top of new developments are a Web site called <http://www.searchenginewatch.com> and <http://www.googleguide.com> by Nancy Blachman, which will help you get even more out of your Google searching.