

We believe the best ideas come from relationships that cherish innovation, from passion that seeks to understand where we are going and not just where we are, from notes scribbled on napkins and not just strategic plans.



The College of Law Practice Management

# News

Summer 2006



## Top Ten Reasons to Come to San Francisco

### Special points of interest:

- Fellow Updates
- 12th Annual Meeting & Induction Ceremony
- InnovAction emagazine

10. The Palace Hotel is a beautiful old dame, updated with first class amenities, just waiting to pamper and treat you.
9. Where else can you ride a cable car "halfway to the stars?"
8. Because Tony Bennett left his heart there.
7. Two words: sourdough bread!
6. Eric Mankin's Saturday morning material promises to ignite a lively conversation - if not a brawl - when he discusses whether or not he thinks it is possible to do anything new in managing a law firm.

5. North Beach, Fisherman's Wharf, the Castro, Chinatown, Nob Hill, MOMA, the Legion of Honor, Golden Gate Bridge, the Bay Bridge, Treasure Island, Alcatraz, Sausalito, the Presidio, Russian Hill, Market Street, BART, Golden Gate Park, the new DeYoung Museum, Seal Rock, Cliff House . . . . .
4. To find out what happens at THIS year's opening reception. Marching band? Bagpipes?
3. To join in recognizing some of law practice management's star performers.
2. You get to see old friends, enjoy stimulating conversation, eat fabulous food and savor those wonderful California wines.
1. Oh, come on. . . .It's **San Francisco!!**

**SEE YOU THERE!**

MAT



Mary Beth Pratt

Instead of my regular "Note," I want to take this opportunity to remind everyone about the Fellow nomination process.

Each year at the Annual Meeting many of us think of colleagues and friends who should be nominated as Fellows. We all know people who have made extraordinary contributions to the profession of law practice

## Editor's Note

management, over a substantial period of time – at least 10 years...and, who would be **contributing** Fellows, helping to lead the College and the profession in new directions.

How often have you thought of this? How often have you actually nominated someone for Fellowship? The Trustees can't know every candidate, so your nomination form – especially it's substance and clarity – is the foundation for discussion and voting.

*Continued on page 6*

## It's Live! Announcing the InnovAction emagazine

After our 2005 InnovAction Awards, it was the goal of the College to produce a special publication showcasing the winners and sponsors of the 2005 InnovAction Awards. Well, we are shouting from the rooftops that it has arrived and it was absolutely worth the wait! Check it out at [http://www.colpm.org/pdf/innovaction\\_emagazine.pdf](http://www.colpm.org/pdf/innovaction_emagazine.pdf).

Talk about innovation...not only does this magazine spotlight our past InnovAction Award winners and sponsors, but it includes several articles from true innovators in law practice management including **David Maister, Bruce MacEwen, Patrick McKenna, Silvia Coulter** and **Gerry Riskin**. Plus, you will enjoy the round-table discussion in the magazine that tackles the challenge of billable hours and existing culture around the practice of law.

The College of Law Practice Management is enormously grateful to all of our contributors and sponsors of the InnovAction Awards program. We would like to specifically thank Jordan Furlong, our Editor-in-Chief from the



Canadian Bar Association and the creative staff at Greenfield/Belser Ltd. for the huge gift of their time, creativity and passion towards the creation of this publication.

Help us spread the news about this wonderful publication. Please contact Karen at [colpm@comcast.net](mailto:colpm@comcast.net) and she will send you a graphic file of the cover page for you to use when posting information on your blog, website or elsewhere.

## InnovAction Sponsorships Still Available—Sign Up Now & Participate in the InnovAction Launch at Annual Meeting!

As the College is preparing to launch the 2007 InnovAction Awards, we invite you and your company, law-related association or firm to consider sponsoring the awards. Our goal is to build wider recognition and prominence for the InnovAction Awards and the College itself.

We are pleased to announce that several associations and companies have become “media sponsors” including the **ABA Law Practice Management Section, International Law Technology Association, Canadian Bar Association** and **Altman Weil**.

There are a variety of sponsorship opportunities available, including Platinum, Gold and Silver levels. Sponsorships may consist of cash, in-kind services needed by the award process, or a combination of both.

If you are not able to sponsor at one of these levels, please consider joining us at the “Friend of InnovAction” level. All you need to do is place a link to our InnovAction website on your website.

For sponsorship details, please contact Karen Rosen at [colpm@comcast.net](mailto:colpm@comcast.net) or Dave Hambourger at [dhambour@winston.com](mailto:dhambour@winston.com). **Hurry, if you become a sponsor by September 1<sup>st</sup> you will be spotlighted in the special InnovAction launch at the Annual Meeting!**

The value of your Fellowship and the visibility of the College are tightly tied to the InnovAction Awards. Be a sponsor and help the College grow in importance. It's good for business and the profession.

## Lively Debate Expected at Annual Meeting—Are law firms the least innovative organizations around?

Our keynote speaker, Eric Mankin, Executive Director, Babson Innovation & Corporate Entrepreneurship Research Center, has spent the summer researching the business of practicing law for his presentation at our Annual Meeting in September. Eric publishes a weekly innovation update. Here is an excerpt from July 31.

*"I've been spending part of my summer on a research project looking at innovation in US law firms, or the lack thereof. According to the interviews I've been conducting with lawyers, consultants, and law practice administrators, law firms may be some of the least innovative organizations in the US economy. This is partially due to the nature of law as a profession. Laws don't change very often. As one of my interviewees noted:*

*"Lawyers practice a profession that is rooted firmly in the power of precedent. They don't want to change and are very suspicious of change efforts."*

*Retired Chief Administrative Officer  
of several law firms, July 06*

*It's also due to the ways in which law firms structure themselves. It's hard to be innovative when you're billing by the hour and you're measured by the number of hours that you bill.*

*"Innovation is not a dominant strategy; profitability is. Law firms will do anything to preserve profitability and not take risks."*

*Consultant to Law Firms, July 06*

Eric reported this newsletter generated a great deal of feedback, and he used his column the following week to highlight some innovative practices in the field of law.

He also asked those he interviewed to speculate on the innovations we might expect to see in law firms over the next decade.

*A number of interviewees suggested changes to "up or out" policies or the emergence of*

*part-time lawyer positions. The prospect of moving to "fixed fee" billing has been a potential innovation for well over a decade, without gaining much traction.*

*Changes in office layout are appealing to many of the executives who run law firm operations – an increasingly mobile workforce means that more of a law firm's space is empty for more of the time. Office space is between 12 and 15 percent of most firms' operating costs, so we might expect to see some new office designs over the next decade.*

*On their own, however, there aren't too many prospects for law firms to be making major improvements – for most, business is too good and change is too risky. For more significant kinds of innovation, we'd need to see a more active and demanding set of corporate clients.*

*"Our clients drive the pace and nature of our innovations. When clients wanted fixed fee billings, we were able to oblige. Lately, though, our clients have not been interested in these new approaches. They want to be able to monitor the hours we spend on their matters, and they want to negotiate a discount on the hourly rates."*

*COO of a mid-size law firm, July 06*

Read the complete articles at: <http://www.biz-architect.com>

### SO, WHAT DO YOU THINK? JOIN THE DISCUSSION ON SEPTEMBER 9.

Following Eric's presentation, Fellows **Ward Bower, Ron Del Sesto, Ross Fishman** and **Jack Hanley** discuss the results and examine how proven innovative methods may or may not be applicable to a law practice.

At lunch, we continue to ride the innovation wave with our luncheon speaker, **Mary Cranston**. Mary is the Firm Chair with Pillsbury Winthrop Shaw Pittman LLP and she will share some of the extraordinary things she has accomplished at Pillsbury Winthrop and why there is hope for your firm as well! Plus, we will launch the 2007 InnovAction Awards!

Visit our website at  
[www.colpm.org](http://www.colpm.org)

## Fellow Updates



**Leonard Gilbert**, a Tampa partner in Holland & Knight's Banking & Finance Group, has been honored by the Tampa Bay Bankruptcy Bar Association as the recipient of the Douglas P. McClurg

Professionalism Award.

The award recognizes a lawyer for his or her outstanding effectiveness in judicial proceedings through preparation, civility and courtesy to counsel and parties. Gilbert is just the second attorney to receive the highly selective award since its inception several years ago.

**Gary Munneke**, a Professor at the Pace University School of Law was recently appointed to a three-year term as a member of the ABA Board of Governors.



**Maggie Callicrate** has joined Edge International as a principal. Maggie specializes in the areas of leadership development, partner assessment and development, client relationship

management, strategic planning, implementation methodologies and practice group management. She also provides advice on governance structures, organizational change and the alignment of firm, practice area and individual business objectives.

caseSHARE has changed its name to Catalyst Repository Systems, Inc. **John Tredennick** CEO, explained that only the name is changing. "We have the same owners, same team and same products as before," said Tredennick. "We decided to change the name to better reflect what we've become over the past decade. From litigation support, to case and claim management, to deal rooms and document review workflow, our systems always seemed to provide a "catalyst" for our clients—helping teams from different organizations work more effectively together than they could separately."

### Attention Fellows:

*It's not too early to starting thinking about extraordinary men and women to nominate as Fellows for the class of 2007. Nominations are due November 1, 2006. Applications will be available at our website, [www.colpm.org](http://www.colpm.org) in early September.*



The College of Law Practice Management would like **THANK** Greenfield/Belser, Ltd. for creating the new College logo. We are so proud of it!



Fellows **Donna Greenfield** and **Burkey Belser** and their staff of creative mavericks have generously donated their time and energy to helping the College refine its identity to reflect our commitment and dedication to innovation and excellence in the field of law practice management. And, they didn't stop there! Greenfield/Belser also designed the fabulous InnovAction emagazine and they are carrying that design to our soon-to-be unveiled new InnovAction website. Thank you!

## Being A Sustaining Fellows Is An Opportunity

There is a gift that keeps on giving. This may sound trite but your Sustaining Fellow contribution to the College is just that. Because you think enough of the College to provide the extra support that makes the mission of the College possible, you also provide incentive to others to give that extra something.

The Sustaining Fellow contribution also provides you with the opportunity to recognize someone you admire, a mentor who contributed to your professional development, someone who should be recognized for their contribution to law practice management, or to someone who is no longer with us but who you know we all should remember. There are many reasons to step up and become a Sustaining Fellow only one of which is to provide the extra funds to make our educational programs and our leadership

in many areas of law practice management successful. The mission of the College is to make a difference, and this is one way to do that.

We thank all of you who are and continue to be Sustaining Fellows. Your foresight and dedication to the ongoing mission of the College through your generous gift is greatly appreciated and well used. We extend an open invitation to all Fellows to consider this unique and special opportunity to recognize someone special, to bring to everyone's attention those pioneers, innovators and stalwarts who have inspired and continue to inspire us.

We hope to hear from you soon. Thanks for considering it.

John A. Cummins, CLM



**Moved? Changed Jobs? Please let us know by e-mailing the College at [colpm@comcast.net](mailto:colpm@comcast.net)**

## College Recognizes 2006 Sustaining Fellows

### Thank You To Our 2006 Sustaining Fellows:

#### **Managing Partner (\$500—\$999)**

Lowell Rothschild  
Harry Trueheart, III

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

W.J. Douglass Boyd, in memory  
of David Brezina  
Charles Coulter  
John Cummins, in memory  
of David Brezina  
James Lantonio  
Nancy Siegel

#### **Advocate (\$100-\$249)**

Donald S. Akins  
Robert Bigelow

James Brill, in honor  
of J. Harris Morgan  
Maggie Callicrate  
K. William Gibson  
Robert M. Greene  
Peter A. Giuliani, in honor  
of Richard Reed  
Wesley P. Hackett  
John Hanley  
Linda A. Klein  
Gerry Malone  
Michael E. Palmer  
Carol Phillips, in honor  
of Martha Ilano, CLM  
Richard Potter  
Joel Rose  
Robert Rubenstein  
Sally Schmidt  
Milton Zwicker

#### Newsletter Committee

Mary Beth Pratt, Chair  
Simon Chester  
Bob Denney  
Jan Waugh

## Editors Note (cont)

Nominations are due November 1, so we wanted to reiterate the 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 10-Year Test. Document a candidate's contribution over a full decade and include objectively verifiable facts that show your candidate meets this test.
- 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, for example writing and speaking to professional groups as well as service to organizations. We honor contributions to the field of law practice management, not in substantive law practice or nonpractice-related community activities.
- What contribution has your candidate 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).
- Finding the right Fellow to second your nomination is crucial; others have information that you don't have. The Annual Meeting is a good place to talk with others about whom to nominate.
- 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, since there's no guarantee that any nominee will be admitted. And, it can be a lovely element of surprise when you tell your nominee for the first time that they've been elected.
- Avoid trivia. Exceptional candidates have exceptional profiles – beyond the bare bones of a formal resume. You shouldn't need more than 10 pages to tell the story of your nominee. Select only relevant information 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 – brainstorm ideas and begin organizing your nominations while you're at the Annual Meeting!

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# Join Us In San Francisco!