

Practice Management eSource

November/December 2007

A Publication of the
Law Practice Management Program of
The State Bar of Georgia

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*A tip of the hat to attorney Jay G. Foonberg, 2007 recipient of the ABA's LPM Section's Sam Smith Award. Attorney Foonberg, noted author and speaker, has helped thousands of lawyers hang out their shingle and prosper through his world-famous, best-selling book, How to Start & Build a Law Practice (among others). **Thanks, Jay, for a lifetime of service to solo and small firm practitioners.***

Tech Talk

Adobe Acrobat 8 Professional

Share and Manage Legal Documents More Securely

Whether you're a corporate lawyer, a legal services manager, a paralegal, or in litigation support, it's critical to have an easily accessible, more secure way to share legal documents with clients, co-counsel, and outside counsel. It's also essential to archive documents and maintain an audit trail of all correspondence, including e-mails and their attachments.

Adobe® Acrobat® 8 Professional software streamlines, protects, and expedites document development for legal professionals. Speed up information collection (interrogatories, due diligence, client intakes), easily find and consolidate documents associated with a case or client, and get everyone on the same page.

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Adobe Acrobat 8 Professional, continued

Some key features for legal application include:

- ▶ Easily provide case information to clients, co-counsel, and court e-filing systems by consolidating information from different applications into one searchable PDF document.
- ▶ Automatically control access to, and limit distribution of, confidential information.
- ▶ Quickly complete contract review and approval, without letting reviewers alter the original document.
- ▶ Quickly change stacks of paper originals to compact, searchable PDF files that look just like paper documents.
- ▶ Acrobat's new redaction and metadata removal tools can help mitigate the risk of unintended disclosure of information while submitting legal documents to opposing counsel or to the courts. Unintended disclosure of information via document metadata is a serious concern for law firms. Examples include improperly redacted files where information is obscured, but still present in the file, document attachments and file properties.
- ▶ Acrobat 8 will also scan an Adobe PDF file for specified types of hidden content, provide a list of what it found, and then allow you to easily remove some or all of that content before you publish the document. This gives legal professionals greater confidence that the document they publish only contains only the intended content and not additional, hidden content.
- ▶ It's easy to apply Bates numbers to a set of Adobe PDF documents. Simply browse and choose the set of Adobe PDF files, and then specify the appearance of the Bates number on each page (either as a header or footer), including size/style, leading zeros, starting page number, prefix, and suffix. Acrobat 8 Professional will apply the Bates numbers in sequential order to all pages of all documents. Acrobat even allows you to resize page content so that the Bates numbering doesn't overwrite content. Acrobat's automated Bates numbering provides a huge time savings to legal professionals, and also provides consistent and flexible numbering across all court documents.

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Adobe Acrobat 8 Professional, concluded

A new and useful tool is the ability to create an Adobe PDF “package” (a group of multiple documents packaged into a single Adobe PDF file), yet retain the properties of individual documents. With an Adobe PDF package, you choose an Adobe PDF cover sheet, and then all other documents are attached to the cover sheet. When you open the package, you can access the cover sheet as well as individual files in a sortable, editable table of contents. All the files in that package can be searched, printed, or individually extracted. You can even add documents to the package after it has been created.

Using an Adobe PDF package, legal professionals can associate related project files, such as an eBrief, a "deal book" and a client document package, in one document that can be read by anyone with the free Adobe Reader software. At the same time, individual files in the package can be encrypted, digitally signed, removed, or added, so that each recipient of the package can read or access only the relevant files for that person.

If you're not currently running Acrobat, or have only installed the free Acrobat Reader, you may want to consider acquiring a copy or two of the new Professional edition for your litigator or paralegal who would benefit most from this tool. Prices start at \$449.00.

If you currently have Adobe Acrobat 7, the improvements in the new version are clearly worth the upgrade price of \$159.00.

More information is available at www.adobe.com/products/acrobatpro. Ω

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Marketing

If lawyers have a flaw in their marketing approach, it may be this: reacting. In other words, instead of setting out a strategy or seeking opportunities on their own, they often hold back and wait for someone to contact them—and then they respond in ways that fail to maximize the opportunity. There is, as you might guess, a better way.

Frequently lawyers invest time in marketing efforts almost by default. They may react to someone contacting them with a request to join a board, an offer to give a speech, an invitation to a networking lunch or the like. As a result, they often fail to put their limited time into the best activities. Inevitably questions arise about whether the given lawyer's marketing efforts are a good investment of time or money for the firm.

Most marketing efforts would be both more successful and more efficient if lawyers took the lead and initiated activities instead of merely waiting for them to happen. The following provides several examples to illustrate the difference between these three approaches:

Simply reacting to an opportunity
Capitalizing on the opportunity with better execution
Taking the lead by analyzing the opportunity and developing creative strategies

Improving Your Initiatives: Five Examples

Scenario: A publication invites you to write an article on a particular topic.

Reacting. You do some research and write the article, meeting your word count and deadline.

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Marketing, continued

Capitalizing. You examine the publication's readership to better understand the audience. Who are they? What positions do they hold? How sophisticated are they? You review some past issues to determine the typical format and tone. You contact the publication's editor and a few clients for ideas on how to make your article more interesting and salient to the audience. You write in an appropriately practical, understandable and useful fashion.

Leading. You think about the best audience for you and your practice. Who has the business you want to obtain? What positions do they hold or what areas of responsibility do they have? Does the publication in question really have the right audience for you? Are they potential clients (such as family-owned businesses, physicians, agribusinesses) or potential referral sources (like accountants, lawyers, valuation experts)? You do some research into what publications serve that audience. If they accept articles from outside authors, you pitch them an idea for an article on something novel, such as an emerging trend or a new way to handle an old issue.

Scenario: A lateral partner joins your firm with an impressive background and range of experience that some of your clients will find useful.

Reacting. You make sure the firm's announcement of the hiring goes to clients and contacts you have on the master mailing list or in the firm database.

Capitalizing. You send a personal letter to selected targets alerting them to the new partner's capabilities and background.

Leading. Recognizing that the window of opportunity is small, you immediately take the new partner to lunch to talk about his practice and learn what he can do to help your clients. You develop a target list of clients and referral sources who would benefit from knowing this new lawyer and set up face-to-face meetings to make introductions. You encourage the new lawyer to follow up with your contacts (say, by sending substantive alerts to them) to stay on their radar screens.

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Marketing, continued

Scenario: You practice in the energy field and subscribe to an industry publication to stay abreast of the issues.

Reacting. You read an intriguing article about developments in the field of alternative energy and think about its effects on your practice.

Capitalizing. You forward the article to some people in the industry with a personal note that you believe they will find it of interest.

Leading. You think about how the developments described in the article will affect companies in the industry from a legal standpoint, and you create an innovative way to approach the issue. You prepare a client alert or white paper to advise selected contacts about the developments and potential impacts. You reach out to clients to suggest a meeting to discuss your ideas. You also contact an energy industry association to suggest a panel or presentation to its members on the subject, sending along your written material for backup.

Scenario: An accountant who's a potential source of referrals invites you to lunch.

Reacting. You accept her invitation and go to lunch.

Capitalizing. You establish an objective for the time you will spend together, so you have a business purpose for the meeting, such as learning more about her practice and clients or discussing something you've handled in her area recently.

Leading. You research the accountant and her firm. You Google her, visit her firm's Web site, talk to other lawyers in your firm and check your firm's database to uncover any other relationships at her firm, and search your firm's intake records for past referrals. Based on what you learn, you generate a list of questions you will ask to better understand how you and she can help each other. You set your objective for the meeting, and after the lunch you follow up with something apropos to your discussion (perhaps an article, a copy of an invitation or a name of a contact). In addition, you tickle your calendar to follow up with her about getting together again. You think of ways you can add value to the relationship, such as introducing her to a colleague, suggesting a joint marketing initiative, coauthoring an article or sending a referral to her.

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Marketing, concluded

Scenario: Someone suggests that you become a member of a particular professional organization.

Reacting. You join the organization and attend meetings when your schedule allows.

Capitalizing. You attend meetings regularly and start to build relationships. You look for ways to be active in the group, by joining a committee or finding a leadership role. You seek opportunities to make your firm more visible in the organization through sponsorships, exhibits or speaking engagements.

Leading. You think about what really interests and excites you. Where would you like to make a contribution? You also think about the kinds of people with whom you would like to network. Are they other lawyers? Mortgage bankers? Community leaders? You then research potential organizations in which you might get involved, and you examine their goals, their structure, their membership composition, opportunities for interaction and so forth. You identify organizations with a mission that you support completely, so you will look forward to attending meetings. And then you get involved.

Increasing the Return on Your Efforts

Compared to reacting or capitalizing, being more proactive and leading your marketing efforts takes more time. It clearly requires more up-front effort to research, investigate and brainstorm opportunities. But you should look at this as an investment in your professional life—if you make certain you're engaging in the right activity and doing it well, the potential for a return will multiply.

If you're not ready to take the lead, at least try to step up your efforts to better capitalize on each opportunity with which you're presented. From there, you can work toward a more planned, and likely more successful, personal marketing effort by: (1) defining your target audiences; (2) researching your opportunities; (3) initiating ideas and activities; and, of course, (4) following through. With enough time and practice, you may even find that the leading process begins to feel natural and enjoyable, too.

This article is reprinted with permission. Authored by Sally J. Schmidt and originally published in the magazine, Law Practice, 9/2007 Ω

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New Materials in Our Lending Library

New Materials in Our Resource Library

Taking Advice: How Leaders Get Good Counsel and Use It Wisely (Although not specifically written for lawyers, this book provides in-depth answers to questions of how leaders with crucial change agendas can most effectively use help they receive.)

How to Get & Keep Good Clients (8 CDs) (This popular book is now available on CD! It's a guide for successfully developing a law practice through use of specific marketing techniques.)

Extraordinary Law Firm, The (use this guide to discover how to make your own firm a great place to work)

Fee Agreement Forms Book, 2nd Edition (although not Georgia-specific, this book has just about any type of fee agreement you can think of (plus a CD, so no retyping))

Law Firm Accounting and Financial Management, 4th Edition (an update of a very well-respected and popular overview of fundamental accounting, financial management, tax planning and reporting, and advanced accounting and financial management issues for lawyers and law firms)

Lawyer's Guide to Marketing on the Internet, 3rd Edition (latest edition that includes topics such as marketing tips to help smaller firms grow, budget-friendly ways to market your firm online, increasing your firms visibility with the latest technology, etc.)

Legal Ethics (2007-2008) – The Lawyer's Deskbook on Professional Responsibility (the most current information for lawyers and judges and an introduction to and analysis of the complex topic of professional responsibility)

If you're interested in borrowing any of the above, please contact Kim Henry at kim@gabar.org or 404-527-8772. Ω

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Vendor Spotlight



GILSBARPRO

Take a Minute, Go Pro.

GilsbarPRO is the exclusive administrator for CNA Lawyers Professional Liability Insurance coverage in the state of Georgia. Their dedicated staff of professionals has the experience, information and resources you need to help manage your malpractice risk.

PROnto Service means your time won't be wasted filling out unnecessary paperwork or being transferred to multiple service locations. They do it all right there at GilsbarPro and their *PROnto Quote* service will take you from initial premium indication through policy delivery in most cases, within 24 hours. The *PROtection and Strength* of CNA, the largest carrier of professional liability insurance in the country, is backed by their *PROfessional Experience* of nearly 50 years in the industry. GilsbarPRO is *PROactive* in providing competitive pricing as well as up-to-date research, articles, and continuing education seminars for their clients. In addition to CNA's attorneys, their own practicing attorneys stay abreast of changes and developments in the profession, and are available to advise you on Loss Prevention issues that may arise.

Visit www.gilsbarpro.com for more information about Gilsbar's products and services. Take a minute, **Go Pro**.

Be sure to check out our Online Vendor Directory at (www.gabar.org/vendor_directory). Here you can find all the services you need from companies who specialize in serving attorneys. Best of all, many of our vendors offer *exclusive* benefits to our members, but you'll only find them on the Online Vendor Directory. You can also voice your opinion (good or bad) on the services you receive from any of our vendors and we will make sure the vendor hears you. For more information contact Jodi McKenzie, Member Benefits Coordinator at 404-526-8618. **Ω**

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Casemaker Tip

Thesaurus Function

Did you know that Casemaker incorporates a Thesaurus function in its search engine?

Casemaker's little-known **Thesaurus** function can provide users with expanded search capabilities. By placing a tilde (~) immediately before a word (*no spaces allowed*), users can find synonyms for keywords. Because the thesaurus allows for the expansion of the number of searchable cases with similar dialogue, this greatly increases the chance of finding case law that is most applicable to your challenges. For example, entering **~alcohol** into the Full Document Search Query box will yield the case law containing the words, "**liquor**," "**whiskey**," "**intoxicant**," "**spirits**," and more.

Entering the word **~car** will yield the words "**car**," "**automobile**," "**auto**," "**vehicle**," "**train**," and others. But users need to be careful. Because the word, "**vehicle**" can also mean, "**conveyance**," this word may also appear in the search. When searching for **~animal** the surnames "**Hare**" and "**Hunter**" may appear.

The Thesaurus function can also be used in conjunction with other search parameters such as **AND**, **OR**, **NOT**, **PHRASE**, and **SUFFIX EXPANSION** searches

If you need assistance with Casemaker, contact Jodi McKenzie at jodi@gabar.org, 404-526-8618 or toll-free at 800-334-6865 Ext. 618. **Ω**

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Life Away From Work

Are you yearning for a place where the quiet is broken only by a heron's call and the sound of the ocean? How about a small, remote island dressed in exotic blossoms and lush palms? It does exist – Little Palm Island Resort and Spa. Part of Little Torch Key, Little Palm Island is located in the Florida Keys, about 30 miles north of Key West. The island is accessible only by boat or seaplane.

Accommodations consist of extra-spacious suites disguised as thatched-roof bungalows. There are no telephones or television, giving you time enough to read that book or indulge in several appointments at the resort's Spa Terre. There are no facilities for your next business function or corporate meeting – this is just for you. If you need serenity, this is the place. For more information, you can check out their website, www.littlepalmisland.com. Ω

Upcoming Events

Educational Opportunities

Below are dates for upcoming training sessions for Casemaker at the Bar Center. These sessions are filled on a first-come, first-served basis and there is no charge for SBG members and their staff.

Casemaker Training:

Tuesday, November 27 and Thursday, December 13, 2007.

Morning sessions: 10:00AM-Noon

Afternoon sessions: 2:30PM to 4:30PM

Wednesday, January 9 and Thursday, January 10, 2008

Morning sessions: 10:00AM-Noon

Afternoon sessions: 2:30PM to 4:30PM

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Educational Opportunities, concluded

Amicus Attorney 2008 Small Firm Edition is practice management software designed specifically for solo practitioners and small law firms of up to 10 users.

Training sessions are available:

Thursday, **November 29th** and Tuesday, **December 11th, 2007**

Morning sessions: 8:00AM-Noon* (Basic)

Afternoon sessions: 1:00PM-5:00PM (Advanced)

The cost of each session is \$75 per person.

*The Nov. 29th morning session is currently full. Please call 404-527-8772 to check for cancellations.

There's a link to information and registration under "Bar News and Events" on the main page of www.gabar.org. You may also contact Kim Henry (kim@gabar.org or 404-527-8772) or Jodi McKenzie (jodi@gabar.org or 404-526-8618) to sign up or get more information.

LexisNexis Seminar - Billing Matters® Bootcamp, Atlanta, November 28, 2008

- Power Billing will focus on Accounts Receivable in LexisNexis Back Office Powered by Billing Matters® for the intermediate to advanced Billing Matters® user with substantial experience in the product. Learn the **POWER** methods – tips and tricks that can decrease the time and increase the accuracy of the setup and completion of your billing tasks. Whether you have 1 or 100 timekeepers in your firm, you will gain unsurpassed knowledge from experts in Billing Matters®, creating a strong foundation to help you manage your billing cycle and your business. Click on this link (www.billingmatterstraining.com) for detailed information and registration. This seminar is not a State Bar of Georgia sponsored event.

If you have suggestions for training programs, contact us at 404-527-8772 or natalie@gabar.org. Ω

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**Want More Resources? More Articles? More Technology Advice? More
Books to Check Out? Sample Forms?**

You can interact directly with the Law Practice Management Program at

www.gabar.org/ga_bar/lpm.html

Practice Management **eSource** is a publication by the staff of
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*LPM Wishes You and Yours
A Very Happy Holiday Season*



Look for our Next Issue in January 2008