Law Practice Management

OREGON STATE BAR
LAW PRACTICE
MANAGEMENT SECTION

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Listening to Clients: End-of-matter Surveys

By Carl Peters

In the past several years, client surveys have been used to get a general picture of how firms are perceived by their clients. Such surveys are done in person, by telephone, or by mail and all suffer from the same weakness—they are conducted as a one-time event and provide only a snapshot of a client's overall perception of the firm.

End-of-Matter surveys take the client survey one step further - they are designed to solicit feedback on a more frequent and consistent basis so that client perceptions can be determined individually for a wide variety of clients and types of matters. Like other experts with special technical skills, many lawyers believe that "excellent legal work" is sufficient to differentiate them from competitors. However, as clients become more and more sophisticated, they are becoming more discriminating in their selection of lawyers and do not depend just on excellent legal work to make their hiring decisions. End-of-matter surveys are a way to bring the client service issue right to the individual lawyer instead of obscuring it at the institutional level.

Designing an effective survey

End-of-matter surveys should be designed with three purposes in mind:

- to measure client satisfaction,
- to identify ways to improve client satisfaction, and
- to focus the lawyer's attention on perceived value to the client, not the technical result achieved.

Since different clients have different definitions for "satisfaction" it is important to pose questions that will uncover an individual client's needs and perceptions. For example, CEO's, corporate counsel and plant engineers all differ in their expectations of the lawyers they hire. So a survey should be tailored to a specific firm's clients and practices.

In general, an effective survey **MUST**:

- be short enough to encourage a client to complete it,
- provide a quick response format that is simple to understand,
- provide background information about the client so the firm can gain insight into why they answered the way they did,
- measure the client's satisfaction with specific service quality attributes.

The survey also MAY:

- measure satisfaction with specific types of service/practice areas,
- rate the client's perception of the law firm against its competitors,
- allow clients to elaborate on some responses in their own words,
- request feedback about specific problems or plans of the firm.

The response rate of end-of-matter surveys is usually much lower than for general, one-time client surveys and is often in the range of 10 percent. Because of this, end-of-matter surveys should be conducted on a regular basis to obtain multiple responses for each lawyer.

What to expect when the surveys are returned

Most of the surveys will report high marks for client satisfaction. This is to be expected since most are from existing clients. However, since end-of-matter surveys are sent to clients when a matter is completed, they will include those who may have just fired the firm. This is quite a different sample than a firm gets from a typical survey. The most important information will be gleaned from the handful of dissatisfied clients and from the one or two questions that were answered negatively by a generally satisfied client. Interesting issues that have been discovered by law firms include:

- "ambush billing" e.g. substantially exceeding the estimated cost because of changes to the scope of work.

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OREGON LEGAL MANAGEMENT ASSOCIATION (OLMA)

ANNOUNCES
THE 2002 SURVEY OF ATTORNEY AND SUPPORT STAFF COMPENSATION & BENEFITS

The 2002 Survey of Attorney and Support Staff Compensation and Benefits is a great success with over 100 firms participating again this year.

Survey information is reported in three geographic categories: All Firms Reporting, Firms in Portland Metropolitan Area, and Firms outside Portland Metropolitan Area. In addition, information is reported by size of law firm or legal department and years of experience.

If you have not purchased a Survey, but would now like to do so, please contact Brenna Green, at 503.295.2668 or brenna.green@greenemarkley.com.

The purchase price of the 2002 Survey Report is $150 for OLMA member firms/departments, $200 for nonmember firms/departments that participated by completing the Questionnaire, and $250 for firms/departments what did not complete the Questionnaire (both OLMA and nonmember firms/departments). The purchase price of the Small Firm Report is $75 for OLMA member firms/departments, $125 for nonmember firms/departments that participated, and $175 for firms/departments that did not complete the Questionnaire (both OLMA member and nonmember firms/departments).

YOUR CONTINUED SUPPORT IS APPRECIATED

SAVE THE DATE!

The Law Practice Management Section and the Oregon Legal Management Association are planning an important Fall Practice Management Seminar:

Speaker: Carl Peters, nationally recognized law firm management consultant

Who Should Attend: Managing partners, law firm administrators, compensation committee members

Topics: How to Motivate through Compensation
Profitability –What to Measure and How to Measure It
How to Implement Meaningful Change

When: Friday, October 18, 2002. Lunch plus afternoon session

Where: Portland - TBA

Details: To follow

WE WILL APPLY FOR CLE CREDIT FOR THIS SEMINAR.

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Comments From the Chair

Evan P. Boone

Ah, the Summer issue. You are probably reading this while on the beach, or climbing in the mountains. Good! In the world of Law Practice Management, taking time to recharge the batteries and to take a broader perspective of our practice, our firm, our lives is necessary. Some folks call this "goal planning"; I think of it as "time travel" – imagine where you will be in 3 years, and then focus back on how you got to your future.

Evan P. Boone

Lots of folks try to do their goal planning / time travel at "year-end", but, at least for me, I found my natural "year-end" is summer time, rather than at the end of the Christmas holidays, tax time, etc.

What does this esoteric discussion of time travel has to do with your Section? Fall and Winter are coming and that means that it would be the perfect opportunity to dive in to the upcoming CLEs offered by this Section, other sections of the Bar, and other law seminars. Fill your tool chest with the substantive and management tools necessary to speed you on your way to your future.

We are firming up some short telephonic CLEs to be offered in September / October on the "advertising" of law firms. We also have a firm management CLE to be scheduled in late November. We will announce the specifics by e-mail, so stay tuned. And, if you have seen a particular author or speaker on a topic of law management that you would like to hear more from, let us know. We'll see if we can make that person available to you, … and the rest of the Section members.

We are pleased to announce that we have a cooperative relationship with the ABA Law Practice Management Section, to be able to offer within our newsletter articles of interest that have appeared in current ABA LPMS newsletters. The ABA LPMS newsletter is a source of valuable law practice management information, and I know that not all of our members are members of the ABA LPMS. The ABA LPMS is offering selected articles for distribution, as a means of exposing to non-ABA LPMS members what benefits they offer.

Finally, I would be remiss if I did not mention that we have room for you on our Executive Committee. If you have an interest in law practice management (which usually is by necessity), we'd love to have you join us, to shape not only your future, but also the future of all Oregon attorneys.

Call me: 503-635-0225 or email me: eboone@ci.oswego.or.us.

Managing Retention in Law Firms

By Gregory Lee

- Do you need to worry about retention?
- Do you lose money on associates for the first 2 years?
- What does it cost to replace a professional with four years of experience?
- Do you know why people leave your firm? (Most will not tell you, so how do you know?)

A strategic look at is retention management

Retention of talent in professional firms is a strategic issue for four reasons. First, from a business perspective, too much turnover is equivalent to waste in an inefficient manufacturing process. By reducing waste, costs are reduced. Second, beyond costs, reputation is everything in professional services and "difficulties" with retention can impact recruitment efforts. Third, there is a strong correlation between satisfied employees in an organization and the satisfaction of clients outside the organization. This makes good sense, and has been repeatedly verified. Fourth, retention problems can lead to reactive decision making in bringing on new talent to fill the voids. This violates a golden rule in management: Always hire the best possible person for key positions. The remainder of this article describes the challenges faced by professional firms in managing retention and offers practical strategies for tackling this issue. The ideas offered are drawn first hand from observations of best practices in law, accounting, consulting, and physician practices. While profession has unique challenges and local market idiosyncrasies, the management principles described are applicable across the board.

Looking at external threats in a firm's environment is necessary to put in proper perspective methods to best manage retention. There are two major types of threats to a firm in respect to retention. First, what are the threats in the environment that are out of a firm's control?

- Today's information age means recruiters from all over the world can be courting your valuable associates without your knowledge.
- Associates talk to other associates within your firm and at other firms; not just in your community but around the country-few secrets exist about compensation, etc.
- Generational differences exist and the meaning placed on work, career, family, time off, loyalty to one's employer can't be assumed to be homogeneous.
- Balancing full time work and full commitment to family doesn't work for most people, so during "the starting a family phase," something has to give.

Second, opportunities exist in the external environment for your employees.

- Opportunities have grown for skilled professionals who want less than full time work or don't want to be on a partner track.
- Client companies, private sector, and public organizations are often ahead of firms in responding to issues about work and personal life juggling.
- Organizations that put emphasis on developing talent, mentoring, and encouraging opportunities for professional growth will attract certain professionals.

What associates want?

Associates coming into firms these days were raised in a different era from most of the partners, and their expectations of work and career are often different. When asked directly what they want, the following themes emerge:

- Freedom
- Fulfilling jobs
- Opportunity for creativity
- Need to be learning
- Desire to be challenged
- Want to make a contribution to a case
- Work hard Monday to Friday, then weekends off for fun, personal pursuits, family

In conversations with associates, there is a strong desire to be part of a team, to be trusted as a smart though inexperienced person, and to receive lots of recognition and feedback about their performance. Associates also expect to be assigned grunt work and detailed pieces of research, but always want to know how their efforts fit into the larger project or overall case. They expect more guidance about learning, developing, and mentoring. For them, this is what it means to go to work for someone else who has more experience and expertise-you get access to their knowledge. It is assumed by associates that they will have access to good technology so they can stay current. Finally, while they want mentoring and training, they also are comfortable taking on independent projects.

1. Strategies for engaging associates

As associates develop and gain experience, their expectations for involvement increase. Associates can be engaged through inclusion in meetings, introductions to clients, and given some amount of discretionary money to use for continuing education or marketing. Mentoring is highly valued by associates, when done right. Of most importance in mentoring is learning the ropes around the firm, how things get done, who knows what, and who to go to for different needs. Associates speak highly of firms making efforts to creatively address needs for productivity and flexibility, e.g. having a reasonable hour billing requirement and then beyond the minimum, compensation is increased proportionately.

2. Mentoring practices

Mentoring is a hot topic in professional firms, yet upon examination few firms carry out mentoring as a consistent, long-term strategy. Mentoring takes more than a few of the partners being great mentors. For a firm to gain the benefits of mentoring, a system needs to be in place so mentoring becomes a feature of the firm's culture. The following is a sample of best practices used by firms:

- For the first 6 months, a partner is assigned to be the associate's mentor; after 6 months, associates pick their own mentor in a preferred practice area.
- Provide client contact.
- Help associates in the first year to develop a business plan/marketing strategies.
- Openly and directly discuss any unrealistic expectations of associates.
- Assess associates' needs and interests, by asking: In what areas do you want to develop? What are your goals?
- Give all associates a set of questions to understand their needs, learning goals, and expectations.
- Have partners identify their interests to determine where they can best add value in being matched to an associate; create mentoring matches that are most likely to succeed for both parties.

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Advice for small firms

Retention problems for the small firm can have much more direct impact than in a larger firm, where the consequences may not be noticed for months or years.

The key management challenge for the small firm is to use the advantages in being small:

- Take advantage of technology that larger firms are slower to adopt.
- Take the interview process seriously-for all hires to your firm; don't delegate such important decisions.
- View flexibility as a strategic way to manage your firm: hours, days, at home work, etc.
- Pick the right people, "people make the practice."

Have a long term (10 years) strategy for your firm, no matter what the size. One way to remind yourself of this is to think about designing and managing your firm as if you were going to develop it and sell it as a franchise. In developing office systems, aim to have the practice be able to run itself. This is a sign that you've hired well and managed the firm as a business. Make sure that employees fit with your practice style and specialty. Here are some examples regarding law firm matching:

- If litigator/defense practices, are your employees comfortable and interested in clients, court, dead lines, etc?
- If corporate or business practice, do employees like the quieter work, helping and advising clients, learning about business issues, etc.
- If divorce work, are employees psychologically comfortable with family tensions, etc.

In a small firm, as owner and boss, your personality will dramatically influence the work culture and atmosphere for employees. Here are some ideas to create a firm culture that is productive, professional, and a good place to work:

- Be at work, know what is going on, know what people are doing, get acquainted, and professionally handle clients.
- Be aware that delegating is a skill that may go against your grain as an entrepreneur.
- Be clear about the expectations for a job.
- Don't assume that an experienced support staff should know everything and never need support for training or more education.
- Have a procedure in place regarding time off/ vacation/sick leave: Support staff should not have to feel like they have to beg you to get time off.
- Don't make excuses for problems with clients by blaming your support staff.
- Partners need to set a tone for respect to associates and support staff.

Law firm culture & strategy

Social isolation is a tendency in firms given the way people work and the nature of the work itself. The importance of retention planning now is that in the years ahead, firms will be competing for a smaller pool of talent. As leaders of a firm, you have the power to shape the firm culture, i.e. the level aggressiveness, the bottom line emphasis, the business/social/personal mix, and how people are treated. While each firm is different, the key message is to actively develop your firm business philosophy and type of work environment so it is congruent with your practice style and values.

Given the tradition and comfort of senior partners, it is important to assess how a firm accommodates and makes decisions about flexibility with individual needs vs. saying "this is how we do things here-take it or leave it." Remember also that associates compare notes, within and across firms. They have great loyalty to each other as colleagues, not necessarily to a firm. Also, keep in mind that rarely can one leader do it all. If dealing with people is not your strong suit, have an administrator who is great with people and money. This person needs to be engaged and empowered to handle the firm business, and also relate to support staff, prefers to be out there with staff, and not isolated in a private office.

The economic slowdown has temporarily reduced the pace of talented professionals moving around. As the business environment improves and hiring increases, your firm will be more vulnerable to losing talent. Making efforts now to manage younger employees and pay attention to some of the practices outlined here can help to prevent the loss of talent. You won't keep everyone, but solid management practices over time will create more loyalty and commitment to your firm.

Gregory Lee, Ph.D. is a management consultant who advises professional firms on leadership development, employee retention and strategic business planning. His services include employee and leadership surveys, 360° leadership surveys, retreat facilitation, management coaching, and organizational development. He can be contacted at 503.282.3192 or leeportland@msn.com.

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- mid-level and senior-level partners who chronically do not meet their work deadlines,
- prices that are perceived as fair but value; price ratios that are not,
- constant, petty complaints about billing formats, lawyers who are perceived by the client as being "in charge" of the matter when another lawyer is officially "in charge",
- clients who are ecstatic about the team of lawyers and its work - and the lawyers are completely unaware of it.
- wide variations among clients about "what is most important to them" in working with a lawyer.

Each of these has a mix of possible interpretations and conclusions that can serve as a focal point for client relationship improvement programs. It is important that any program to strengthen weak areas should focus on the attributes that are not only weak, but are also important to the client. For example, many firms have focused a great deal of time and money on improving the format of their bills because this area is often criticized by clients. However, surveys conducted over the past several years demonstrate that this attribute is not very important to the retention of a firm. Examples of other attributes and their typical ratings are shown in the following matrix.

Because these surveys measure the personal response of individual clients to the work of a specific lawyer, individuals may be quite sensitive about their results. The following rules and observations are offered to assist the efforts of a firm considering end-of-matter surveys:

- A maximum of three people should see the individual survey results — The Managing Partner, the Marketing Director and the lawyer being reviewed. This lawyer may distribute it to others working on the case if appropriate.
- Results of the surveys should be presented once a year to the partnership and used as a reason for more conventional marketing tactical programs that are designed to improve perceived value.
- Since positive reinforcement improves performance more quickly than negative reinforcement, negative surveys should be discussed only between a helpful Marketing Director and the lawyer.
- There is a natural tendency to use these surveys to evaluate the lawyer whose project has been sur veyed, particularly for younger lawyers and lateral hires. However, clients exhibit considerable variation in their responses about a particular lawyer. The most respected lawyers will be criticized unfairly and the most inept will receive glowing recommen dations. The tendency to use surveys as performance indicator for compensation will diminish substantially when a highly compensated partner receives a negative review.
- The marketing director should personally call every client who reports satisfaction below their expectation and inter view them in a non-defensive way. Clients appreciate this a great deal and the interview provides an opportunity to learn much more about the problem.

In a competitive environment where a premium is placed on building relationships with clients, end-of-matter surveys provide information to help an individual lawyer with this process. In addition, these surveys can position the Marketing Director as a coach who, aware of a lawyer's strengths and weaknesses, can confidentially work with her to help understand the complexities of client relationships and how to improve them.

Carl Peters is a national consultant to law firms for marketing, management, and strategic positioning. A former legal administrator, he has been a Director of Hildebrandt, Inc. and an officer of a public corporation. He is co-author of "Climb To The Top - Client Development for Lawyers" and is a frequent speaker at NALFMA, Bar and ALA conferences.

Practice Tips for the Quarter

Practice Tip #1

Practice management advisors from bar associations and law societies (in Canada) make numerous visits to law practices to help lawyers in the management of their practices. One issue that frequently arises is the confidentiality of client information. If you are in an office sharing arrangement, you should take overt steps to ensure that persons not associated with your practice do not have access to your files or other client information. Client files must remain confidential, and that confidentiality does not extend to other lawyers or non-lawyers sharing your suite. Lock your office door when you're out of the office. Remember to do the same with the files on your secretary's workstation or in file cabinets in a public area. Also, if you share a receptionist, be sure to periodically remind him or her not to discuss your business or your clients with others sharing the suite.

Practice Tip #19

If your practice slows down a bit this summer, take some time to review your practice. Do you need to revise your business plan? Need to develop that marketing plan? Are your office systems adequate to avoid malpractice? If you need assistance with practice management issues, contact your state bar's law office management assistance program. They have information and ideas on how to improve your business.

LAW PRACTICE MANAGMENT SECTION OREGON STATE BAR

Executive Committee Meeting

March 15, 2002

The March 15, 2002 meeting of the Executive Committee of the Law Practice Management Section of the Oregon State Bar was called to order by Chair Elect John Cummens at 2:37 p.m. at the offices of the Oregon State Bar in Lake Oswego, Oregon.

Present:

In person: John Cummens, Chair Elect; Leslie Mackenzie; Dawna Brophy; Mary Sauer; Candace Haines, Secretary
By telephone: Fern Puls
Staff: Margaret Robinson, Bar Liaison

Absent:

Evan Boone, Chair; Steve Hutchinson, Past Chair; Craig Edwards, Treasurer; Warner Allen; John Wolf; Mark Oldenburg; David O'Brien; Craig Emerson; David Hytowitz; Carol Wilson, PLF Liaison

1. Welcome and Introduction of Members:

As this was her first meeting, Leslie Mackenzie introduced herself

2. Minutes:

There was discussion that it was nice to have the minutes via e-mail. Leslie MOVED approval of the minutes as written. John SECONDED. The motion passed UNANIMOUSLY.

3. Treasurer's Report:

The Treasurer's Report was reviewed. Copies will be available at the May meeting. The present balance is $8,133.75.

4. Newsletter:

a) The deadline for the next newsletter is March 18. Margaret thinks the mailing date is about two weeks later.

b) There was no report on vendor advertisements in Carol's absence.

c) John has sent an e-mail to the ABA about their newsletter. John stated that he wanted input from Mary and David about the newsletter, so there would be no decision made at this meeting. As the Section has about 400 members, it would cost $800, or $4,000 per year. This amount seemed high to those in attendance. John has not yet been able to pursue a scaled down, less costly option, such as using just a few articles from an edition. He stated that he felt that, if the whole newsletter was obtained, there would probably be a lot of material that would not be used.

d) The summer newsletter deadline will be in about two months.

e) Mary suggests other topics for the next issue: small firm management and associate retention. John sug suggests getting the most out of your technology insofar as this addresses how good technology has leveled the playing field between big and small firms.

5. CLE Planning:

a) OLMA will be starting to plan Legal Technology 2003 in late spring. This program will be a joint presentation with the LPMS.

b) John is working on a list of collaborative projects between OLMA and LPMS so the threads are not lost over time with membership changes.

c) Teleconferencing should be put on the next agenda as Carol should have a report back from her Alabama contact.

d) Evan has stated that he would contact the chair of the Solo and Small Firm Practice Section, so a report will be forthcoming.

e) Speaker's bureau: Wait for Evan. Dawna stated there is a speaker's bureau for CPAs. She will e-mail the information on this to Evan. Mary stated that there is a speaker's bureau for Portland—maybe through Portland State.

6. Electronic Communication:

a) Web page: Wait for Evan.

b) Meeting notices: Do away with hard copy notices and do all by e-mail.

c) List serve: This is a good idea because it is possible to cut and paste to interested people. OLMA has a very active list serve. John would like a full section list serve. Margaret will re-send the information on the list serve for the executive board.

7. Report on OLMA/LPMS CLE Program:

There were 67 attendees at the Partner Dinner and 62 at the half day CLE. Registrations for the CLE—$4960. Sponsorships—$2500. Expenses are not all calculated yet, but there was a profit. 80 attendees had been anticipated, so registration fees were down, but so were expenses. There were four parts to the event this year: the Partner Dinner, the OLMS/LPMS CLE, the OLMA luncheon, and the OLMA 25 year celebration. It was a big success.

The meeting was adjourned at 3:35 p.m.

May 17, 2002

The May 17, 2002 meeting of the Executive Committee of the Law Practice Management Section of the Oregon State Bar was called to order by Chair Evan Boone at 2:05 p.m. at the offices of Harrang Long Gary Rudnick, 101 E. Broadway, Suite 400, Eugene, Oregon.

Present:

In person: John Cummens, Chair Elect; Steve Hutchinson, Past Chair; Fern Puls; Candace Haines, Secretary

By telephone: Evan Boone, Chair; Dawna Brophy; Craig Edwards, Treasurer; David O'Brien; Darla Pierce; Donna Richardson, Bar Liaison; Mary Sauer; Carol Wilson, PLF Liaison

Absent:

Warner Allen; Leslie Mackenzie; Mark Oldenburg; Craig Emerson; David Hytowitz, BOG Contact; Margaret Robinson, Bar Liaison; John Wolf

1. Welcome and Introduction of Members:

As there were very few people present in person, this matter was handled with the utmost dispatch.

2. Minutes of March 15, 2002 Meeting:

The minutes were approved as written.

3. Treasurer's Report:

Treasurer's Report: The Treasurer's Report was delivered by Treasurer Craig Edwards. At the time of the last meeting, the balance was $8,133.75. As of this meeting, the balance is $8,199.00. Craig stated that he has concerns about the membership total. So far, the Section has received $4,600 in membership fees. We budgeted $5,500. The records indicate that we have 36 fewer member this year than last year. We currently have 230 members. Bar Liaison Donna Richardson stated that Sarah Hackbart had created a list of members who have not renewed and sent it out. No one present or on the telephone had the list. John suggested that we obtain copies of the list, then call anyone on the list we know. We can remind them to join and ask why they may have dropped the section.

4. Newsletter:

a) Current issue: Mary stated that the newsletter was going out to be printed May 17. It will take about two weeks to be delivered. Chair Evan Boone asked Mary to check on the e-mail problem with the Bar.

b) Future issues: Mary stated she had been thinking of a financial issue for the summer. Evan stated that maybe, shortly after this edition comes out, it would be wise to plan a phone CLE with the lead writer. This will be discussed later. Mary requested volunteers for authors.

c) ABA LPM newsletter articles:

(1) Individual articles: Mary stated that the ABA Law Practice quarterly has great ideas. She thinks this is only on line currently, not in print. The last issue was September, 2001. When John spoke with the ABA, he was told he could get either all or nothing. He does not know if they might have changed policy and would now provide one or two articles. Mary stated that there are one or two good articles each edition and that they are a good length for our use.

(2) How many LPMS members receive the ABA LPM newsletter: Evan suggested that we could put this question out on the list serve for the membership. He stated that he would write a welcome to the list serve message, and would add this question into it.

5. Joint Projects with OLMA:

John will work on this in early June. He estimates it will not take long.

6. CLEs:

a) Final report on OLMA/LPMS Partner Dinner and Program: John stated that they were still wrapping up on expenses. There is a profit, but it has not yet been paid into the treasury.

b) Tele-conferencing:

(1) Contacts: Contacts in Arizona reported a teleseminar on ethical and management aspects of providing unbundled legal services and another on winding down a practice. There were 200 "attendees" at a phone cost of about $2,000. Contacts in Missouri state they deal with AT&T and say AT&T will make deals. No figures were available.

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(2) John Cummens: Evan stated that his working figure was $15 per hour. John stated that the Association of Legal Administrators charge by the site—no matter how many people are at a site. He stated that running this kind of conference would be expensive—you would have to have one site per city. He stated that OLMA is considering setting up ABA sites for tele-seminars. He asked what if LPMS worked with OLMA on this. Then, for ALA seminars, he suggested, LPMS could join forces also. He suggested lining up firms in each city to serve as sites. OLMA has charged $15 per person. They have not lost money, but atten dance has been dropping. High quality materials are sent out and someone needs to copy those at each location. Evan stated he thought $15 per person was too low—we could charge $25 and it would still be inexpensive for CLE credit. John also stated that both ALA and ABA provide two hour seminars. Each ABA site costs $269. Evan directed John to proceed and set dates. He directed that we stay with Portland and Eugene for the first attempt.

Carol **MOVES** to authorize John, Dawna, and Evan to get the program together, agree on a price, and launch this initiative. Mary **SECONDS**. John and Dawna stated they could start work on this next week. Evan requested they start scheduling the seminars in mid-August to get the kinks worked out before the heavy season. Motion passed **UNANIMOUSLY**.

c) Publicizing:

(1) Solo and small firms: Evan will work on cross-publicizing.

d) OLMA joint sponsorship of conference 11-23: John stated that the Education Committee for OLMA has started putting together a schedule for meetings. They knew LPMS was thinking of a fall conference. They have been able to confirm Carl Peters for November 22. They do not know yet whether this will be a half day or a full day conference. John stated that, if LPMS was interested, we could jointly sponsor this event. John will find out what Mr. Peters charges. In the past, for events of this type, he has expected 60 to 80 people. He will try to keep the charge to the participants to under $50.

e) Speakers:

(1) CPA: Evan has a call in to the CPA Speakers' Bureau. Suggested topics: how to set up your books as you start out, how to track items, etc. Evan suggests a one hour program and suggests it might be in conjunction with another topic. These might be provided for free.

(2) Through ABA LPM newsletter: Evan has contacted Trey Rider, who could speak on marketing. One hour of a phone seminar would cost $1,000. In person, it would be $5,000. Evan would like to wait until we have a track record before we go to this kind of expense. Evan has also contacted Richard Scholnick He is an entrepreneur who gives legal advice and who does business development for law firms. He would charge $500 for a phone seminar for one hour: 40 minutes of talking and 20 minutes of questions. He could target how to target clients or industries. John stated that ALA National has reviews of many speakers. He will check both of these gentlemen's names and report back. Legal Technology Show 2003: John stated he is close to putting together a general planning committee. He will then develop subcommittees. The show is next April. He questioned whether LPMS wanted to participate. Evan suggested asking the question on the list serve. This method could also generate more executive committee members. John stated that he would put together an outline of what it means to be on the committee. He will be able to do this when he gets back from his upcoming conference.

7. Web Page/List Serve:

a) Web page: Evan will put more newsletter articles on the web page.

b) List serve: The list serve is up and running. Evan will send out a welcome and questionnaire regarding ABA membership.

8. New Business:

a) Third Thursday: This group wants us to provide an e-mail notice of their meeting (see description in agenda).

b) Mary reminds everyone she needs newsletter articles by June 28. The newsletter will be out by July 26.

9. Next Meeting:

Harrang Long Gary Rudnick offices in Salem, 333 High Street, NE, Suite 200. 2:00 p.m. The meeting was adjourned at 3:55 p.m.

LAW PRACTICE MANAGEMENT SECTION OF THE OREGON STATE BAR EMPHASIZES THE ADMINISTRATION AND MANAGERIAL SIDE OF THE PROFESSION OF PRACTICING LAW WITH THE FOLLOWING MISSION:

1. To assist sole practitioners and lawyers in small, medium, and large law firms to develop better law practice and firm management skills.
2. To enable law firms to improve their profitability in a competitive environment.
3. To help lawyers and law firms adapt to technological change.
4. To assist lawyers and law firms to improve their client service and attorney-client relationships.
5. To provide national law office management resources to members of the section.
6. To work closely with the Oregon Legal Management Association, The Professional Liability Fund, the Young Lawyers Section and the emerging Sole Practitioners and Small Firm Section in realizing such goals.

Oregon Legal Management Association (OLMA) is a volunteer organization working to provide educational opportunities to managerial/administrative personnel in law firms. The Oregon State Bar and OLMA have worked together for many years in the presentation of CLE programs and the promotion of management awareness in attorneys. OLMA serves approximately 110 members across the state.

Association of Legal Administrators (ALA) is an international organization of which OLMA is a chapter. Like OLMA, ALA provides educational opportunities for both attorneys and legal administrative/managerial staff including conferences, educational materials and publications. ALA services approximately 9400 members internationally.

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LPMS Meeting Schedule for 2002

September 27	OSB
November 15	TBA
January 17, 2003	TBA

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Law Practice Management Section
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