

SEARCH FOR GLOBAL INNOVATION BEGINS

Announcing the
InnovAction
Award

In January, the **College of Law Practice Management** launched the first annual global search for lawyers, law firms and other deliverers of legal services who have invented and successfully applied totally new business practices to the delivery of legal services. The InnovAction Award, sponsored by the College in concert with **Edge International**, will be presented in four categories:

- Client service -
“Client Service Virtuoso”
- New market creation -
“Market Disruptor”
- Knowledge management -
“Knowledge Star”
- Leadership - “Leader Ship”

Entry forms can be found at www.innovactionaward.com or through the College web site (www.colpm.org).

In a recent U.S. survey, when chief legal officers were asked about the most innovative practice proposed or instituted by their outside counsel in the past year, only 23 percent of the respondents were able to identify any innovation at all. Yet, in an earlier UK study of FTSE-100 companies’ perceptions of the legal profession, innovation was ranked among the most important factors in choosing a law firm.

In 2004, many lawyers will ponder these statistics. Some may even do something about it. One way to help stay on the right side of a client’s “retain or ditch”

decision is to listen and respond inventively to client needs; to identify and deliver innovative practices that genuinely meet those needs. This new initiative by the College will seek out and recognize innovation that genuinely and directly helps the consumer of legal services.

“We’re interested in new ways of thinking about the provision of legal
(continued on page 2)

Editor’s Corner

NEWSLETTER REPORT FOR 2003

Thanks to a wonderful committee that includes **Jan Waugh, Roberta Montafia, Bob Shack, Bob Denney, Dodie Stewart** and **Stephen Mayson**, we published four editions last year.

Thanks to Roberta and Dodie, we conducted a reader survey in the fall. Only 12 Fellows responded, but we were pleased to hear that you find it useful and that four issues are just right. You mainly print it to read it. You like “Insights/ Profiles,” “Book Store,” “Editor’s Corner,” and “Chuck’s Notes.” You want more information about Fellows and articles about the impact of trends in the profession and society; practical suggestions for solos; advanced management concepts; governance; partnership pay; new law firm paradigms; multi-generations in the workforce; managing change; and time management.

Your newsletter committee is concerned about finding enough good contributors and developing articles that are of most interest to you. We need you to volunteer to write on some of the interesting topics that you have requested (or, to suggest prospective authors to us). Please send me your suggestions for other authors, or volunteer yourself. Thanks for reading this past year – we will continue to try to bring topics of interest to you.

-- Mary Beth Pratt

InnovAction Award (continued)

services wherever they may be," said College vice-president Merrilyn Astin Tarlton, in a press release accompanying the announcement of the award program. "While the philosophical underpinnings of the legal profession have traditionally driven law firm managers to rely on precedent in decision making, we know a good deal of exciting thinking is now at work to solve the business challenges of law practice with little or no concern for the restrictions of tradition. We want to focus thinking on these extraordinary achievements and, we hope, inspire more."

A panel of judges will select the award recipients in July of this year. The actual presentation of the awards will occur in September at the Tenth Annual Meeting of the College in Chicago.

Entries will be judged on the basis of four primary criteria:

- Absence of precedent (never been done or done quite this way before)
- Evidence of action (the innovative idea was transformed into action and not merely reflective of best intentions)
- Effectiveness of innovation (there is some measurable outcome that would indicate that the innovation is accomplishing what it was intended to do)
- Action must have taken place within no more than three years prior to this entry.

Patrick McKenna, principal of **Edge International**, also was quoted in the press release: "The goal is to demonstrate for the profession what can be created when passionate professionals with big ideas and strong convictions are determined to make a difference. Too often we hear lawyers saying things like 'We've never done it that way!' or 'Who else has done this?' It is our intention to help the College seek out and identify

those rare few whose fearlessness has created a business advantage."

The judges will include three Fellows:

- **David Hambourger**, Technology Partner for Winston & Strawn, Illinois
- **Merrilyn Astin Tarlton**, Principal of Astin Tarlton and Editor of the ABA's *Law Practice* magazine, Colorado
- **Harry Trueheart**, Chairman of Nixon Peabody, New York

as well as:

- **Patrick McKenna**, Principal of Edge International, Edmonton, Canada
- **Dennis Sherwood**, author of *Smart Things to Know About Innovation & Creativity*, London, U.K.

The sponsors of the four award categories are **Edge International** (Client Service Virtuoso Award), **Greenfield/Belser Ltd.** (Market Disrupter Award), **Baker Robbins & Company** (Knowledge Star Award) and **Microsoft Corporation** (Leader Ship Award). Additionally, the **American Bar Association's Law Practice Management Section**, the **Canadian Bar Association**, the **Law Marketing Portal**, and the **Association of Legal Administrators** are "Partners" in the award program and will promote nominations through their publications and websites. **Levick Strategic Communications** is providing media relations assistance.



Any lawyer, law firm or entity providing legal services to clients anywhere in the world is eligible and encouraged to enter this competition. Further information is available about the awards, eligibility restrictions (for example, College Trustees' firms are **not** eligible to enter) and entry forms at www.innovactionaward.com.



Note to Calendar:

College
Tenth Annual
Meeting and
Induction
set for
Sept. 10 - 11, 2004
in Chicago,
Westin River North

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PERSONAL INSIGHTS -- INTRODUCING:



NANCY SIEGEL, who founded her own consulting firm, Siegel Management Strategies LLC, in 2001. During the previous 20 years, she served as the executive director of three major law firms based in San Francisco. She may be reached at nsiegel@siegelstrategies.com.

Q: What did you like most about your work as a legal administrator?

A: I was very fortunate to have worked for three outstanding firms (Morrison & Foerster; Brobeck Phleger & Harrison; and Lillick & Charles). It was exciting to be an administrator in the 1980s and to be part of a management team that was “inventing” the large multi-office law firm. There was no blueprint for the mega-firm or the international firm back then, so those of us with firms who embraced growth strategies were in positions to be creative, to be innovative. In the 1990s I particularly enjoyed the greater focus on strategic planning and the beginnings of practice management, as we know it today.

Ultimately, however, my answer to this question is that I enjoyed working with so many talented people – the attorneys and the staff. The job was always challenging, often fun, sometimes frustrating, but never boring!

Q: Why did you decide to become a consultant – and to form your own firm rather than join a larger consulting firm?

A: I thought about becoming a consultant for several years before I finally made the break from being an employee to forming my own firm. Consulting was attractive to me because I could focus more of my time on the kinds of management challenges that

interested me the most. I decided to go on my own, rather than join a larger consulting firm, because I wanted the greatest possible flexibility in choosing the kind of work I wanted to do and setting my own hours and financial goals. Also, I looked forward to the challenge of being an entrepreneur.

Q: When did you know you had made the right decision to be a consultant?

A: There has been no epiphany moment for me, but a gradual and growing sense of how much I care about my clients; how excited I am when my proposals to new potential clients are accepted; and how gratifying it is when a current or former client calls again asking for assistance. Being a consultant allows me to draw on 20 years of management experience and to apply that knowledge to a wide variety of clients – mid-size firms, large firms, small firms, and start-up firms. I have found that the client-consultant relationship can be very rewarding.

Q: If you weren't working within the legal field, what profession would you pursue?

A: Well, my true desire would be to write and publish mystery novels. So far, I have shown a great aptitude for reading books – I always have at least one book going – but not enough discipline to actually sit down for the requisite period of time to write one! Maybe next year...

Q: Share a lesson learned from your years in the legal profession.

A: I have learned so much, both from experience and from having great role models. A few of the management lessons that stand out for me include:

- Take reasonable risks – don't let the fear of making a mistake hold you

- back from trying new things, new ways.
- Learn from your mistakes as well as from your successes – strive for continuous improvement.
 - Don't assume – make decisions based on knowledge, not assumptions.
 - Focus on results – and don't get bogged down in unnecessary process.
 - If you want things to change, start doing things differently. (This sounds obvious, but it is often more comfortable to rely on what has worked in the past rather than to meet new challenges with new strategies.)
 - Create and maintain balance – in work and other aspects of life.

JIM ST CLAIR, a 68-year-old, West Virginia, general practice attorney who, after 41 years in the courts, now manages his family real estate investment company when not on the tractor or in some distant place "spreading the LPM Word." He can be reached at jwstclair01@hotmail.com.



What to get a little boy who only wanted a Hereford bull for Christmas? Why would having a Ford 4000, three-plow tractor make that boy a better lawyer?

All these experiences contributed to my work in the general practice of law. It is easier to discuss construction problems with contractor clients when you have your own backhoe (Case 580 C). Helping people from all walks of life has been my privilege and the LAW has offered me the vehicle to pursue it. To accomplish this, I believe it is essential to know and relate to clients...even corporations are run by people. Being a plaintiff's trial lawyer offered many opportunities to champion the poor, the weak and the injured against the rich and powerful.

My year in Bosnia as a volunteer lawyer was a major effort "to make a difference" to help others. What did I accomplish? Who knows? Think about the parable of the man who sowed seeds. Some fell on rocky soil, some on the paved road, and none of these grew. Some fell on fertile soil and grew. My job in life has been to sow seeds. Whether any grow is up to others, but I will keep on sowing. Bosnia surely gave me a new perspective of the world beyond West Virginia.

Where will I be five years from now? Who knows? Several things are certain: you won't find me on a golf course or tennis court. I do not know how to play and have no desire to learn. You may find me on the old Ford, blowing leaves in the fall, or on the old Case, digging stumps, or on the Scagg 72-inch hydrostatic lawnmower, cutting my wife's 18-acre lawn. On the other hand, hopefully I will be spending time "sowing seeds" in Belgrade, Novi Sad, or elsewhere. I may even be negotiating leases for our real estate company where I spend my "spare time" out of our home.

I think Hal Fedder said, "I would rather be lucky than good." I have been very lucky! My wife and I are totally independent except for our dog "Snyfer." We have four wonderful children, two of whom are in the legal field. Seven grandchildren bring joy into our lives, daily.

My friends and "mentors" in the College not only made me a better and more successful lawyer, but also a better person. If I tried to thank them, the 600-word limit would be greatly exceeded. So to all of you – past, present and future – "THANKS" for not only the great legal stuff, but also for the caring and sharing. Some of your "seeds" took root and I will continue to try to pass them on to others.

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to volunteer to
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"hardened combat
veterans?"*

More than 30 years in the LPM field has been one of the major experiences of my lifetime, and hopefully, yours. Let's all renew that old "missionary zeal" that propelled our "founders" to go on the road, week after week, spreading the "message." We are never too old to volunteer to SHARE our experiences with others, and who can do it better than us "hardened combat veterans?"

NOTES FROM CHUCK

The Board of Trustees held a very productive meeting in Denver on January 10. We welcomed College newsletter editor **Mary Beth Pratt** to her first meeting as a Trustee and did business on these items, among others:

- Reviewed and approved the 2003 financial reports (see financial summary on page 6); and reviewed and approved the budget for 2004, achieving some cost savings by using electronic distribution of materials for Trustees' semi-annual meetings.
- Discussed issues and ideas about the Tenth Annual Meeting next September in Chicago and charged the Program Team headed by **John Cummins** with developing a celebratory program.
- Enjoyed a demonstration by Communications Team chair **Dave Hambourger** of the new College "Library" on our remodeled web site (please share some of your published materials for the Library – and check out our new, improved web site at www.colpm.org).
- Enthusiastically approved the InnovAction Awards program developed by **Merrilyn Tarlton** in concert with **Patrick McKenna** of Edge International (see the article on page 1), and awarded Merrilyn the College's "Just Do It!" award.
- Smiled at the Sponsorship Team's reports on contribution commitments by several sponsors and hopes for additional sponsorships.

- Considered the qualifications of 15 nominees for 2004 Fellows and elected nine of them.
- Selected Vancouver, BC, as the site for the September 2005 Annual Meeting.
- Thanked **Sandy Geist** for her continuing, outstanding work as our part-time administrator.

As we keep saying, the success of the College depends not only on the work of the Trustees and the administrator, but on the participation and contributions of the Fellows as well. The wisdom and experience of the Fellows are the College's most valuable resources, and the strategic plan is to share those resources with the broad spectrum of professionals and organizations represented in the College. How can you help the College to be all that it can be?

- Become a Sustaining Fellow to provide financial assistance to our very lean budget.
- Submit some articles you've already written to **Dave Hambourger** for the College Library on our web site.
- Submit a new article to **Mary Beth Pratt** for the College Newsletter.
- Submit your 200-word profile to **Sandy Geist** to expand the information available in the College Directory on the web site.
- Contact legal media in your area to encourage publicity for The InnovAction Awards.
- Clip any media coverage of the Awards and send it to Sandy Geist.
- Most important – plan to join us for the College's Tenth Annual Meeting in Chicago, September 10-11.

Don't be shy – raise your hand, send an e-mail, pick up the phone, "Just Do It!" – let us know how you will help the College achieve these goals.

Chuck Coulter, President
chuckcoulter@slhlaw.com



Reminder:

2004 Dues are due. At "press time," we had received payments from just 106 of the 200 Fellows.

We extend a hearty thank you to those who have contributed as Sustaining Fellows so far this year:

President's Club (\$1,000)

William Bachman

Managing Partner (\$500 - \$999)

John Cummins CLM

In Memory of

David W. Brezina

Francis Musselman

In Honor of

Roberta Cooper Ramo

Lowell Rothschild

Harry Trueheart

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

James Brill

In Memory of Lee Turner

and Luther S. Avery

Peter Giuliani

In Honor of Richard Reed

Advocates (\$100 - \$249)

Barbara Akins

Donald Akins

Robert Bigelow

Guy Bennett

W. J. Douglass Boyd

In Honor of The "Denver

Dauids," Brezina & Vogels

Robert Boyer

Margaret Callicrate

Silvia Coulter

F. Leary Davis

In Honor of Bob Wilkins

Wesley Hackett, Jr.

John Hanley

Elizabeth Kalb

D. James Lantonio

Gerry Malone

Carol Phillips

Richard Reed

Robert Rubenstein

Mary Ruprecht

In Honor of the Honorable

Clinton W. Wyant

Sally Schmidt

Robert Yegge

Financial Overview Fiscal Year 2003

Assets	12-31-03	12-31-02
Charles Schwab & Co. Money Market	\$25,417	\$25,484
First Community Industrial Bank CD	7,174	6,986
Wells Fargo Checking Account	3,842	4,581
Total Assets	\$36,433	\$37,051

Income

Dues	\$25,275
Sustaining Fellows	5,800
Sponsorships	15,000
Induction Fees	9,233
Meeting Registrations	21,068
Other	650
Total	\$77,026

Expense

Administration	\$15,941
Annual Meeting	48,198
Corporation Expenses	1,173
Newsletter Layout	1,736
Office Supplies	436

Expense (continued)

Telephone and Fax	\$626
Postage and Delivery	352
Printing and Reproduction	580
Directory Printing/Postage	1,315
Web Site	3,986
Other*	3,301
Total Expense	\$77,644

Bottom Line

\$77,644

-\$618

*Miscellaneous and Trustees Mid-Winter Meeting (meeting-room rental, A/V equipment and meals; Trustees pay their own transportation and lodging)

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