

## Chicago-Bound



2004 Annual Meeting  
Chicago, Illinois  
September 10 and 11

In just a few weeks, College Fellows from around the world will convene in Chicago for our Tenth Annual Meeting. We will be wined and dined, entertained, challenged by thought-provoking presentations and just in general have a good time with old and new friends. As an added attraction, we will meet the four happy winners of the InnovAction Award and learn from them how they have demonstrated ingenuity in the management of the practice of law. Don't miss this special occasion.

Our room block at the Chicago Westin River North will be held **only through August 20**, so if you haven't made your reservation yet, do it now. Call 1-800-937-8461. And then send in your registration form and fee so your College administrator can make the necessary arrangements.

## Announcing . . .

. . . the winners of the **InnovAction Award**. You, the Fellows of the College, are the first to know. Well, the second actually – we had to tell the winners first. **See page 4.**

## Thanks to Our Sponsors

We have a particularly generous group of sponsors this year that are helping the College provide an outstanding Tenth Annual Meeting and other programs for the Fellows. You are no doubt familiar with most of them, but we think they deserve a more thorough introduction than just their names in our newsletter and on signs at the meeting.

### *Our Sponsors That Serve the Profession*

**RR Donnelley**, the overall sponsor of the

College's 2004 Annual Meeting, is "the world's premier full-service global print provider and the largest printing company in North America. The company serves customers in the publishing, healthcare, advertising, retail, technology, financial services, and many other industries. Founded 140 years ago, RR Donnelley provides solutions in commercial printing, forms and labels, direct mail, financial printing, print fulfillment, business communication outsourcing, logistics, online services, digital photography, and content and database management."

**Martindale-Hubbell** is sponsoring the Induction Dinner for the second year in a row. "Generations of lawyers have relied on Martindale-Hubbell as the authoritative resource for information on the worldwide legal profession. With a history spanning more than 133 years, the Martindale-Hubbell Legal Network is

## Editor's Corner

Welcome to the summer issue of the College newsletter. Our focus is on the Tenth Annual Meeting, September 10 and 11 in Chicago. We look forward to seeing many long-time friends and welcoming our new Fellows.

Your newsletter team hopes to sign up more Fellows to write articles and book reviews, summarize recent conferences you may have attended, and be profiled. Please look for us at the meeting and volunteer — we need your help.

Thanks for reading.

**Newsletter Team:** Simon Chester, Chuck Coulter, Bob Denney, Dodie Stewart Gaudry, Sandra Geist, Roberta Montafia, Bob Schack, Jan Waugh and Mary Beth Pratt, managing editor.

currently powered by a database of over one million lawyers and law firms in 160 countries. LexisNexis Martindale-Hubbell is proud to introduce a new magazine, *Counsel To Counsel*, a copy of which will be provided all College annual meeting attendees. Following Martindale's tradition of connecting the buyers and sellers of legal services, they have created this bi-monthly magazine to bring corporate counsel and premier law firms together to share information about best practices in corporate legal services."

**John L. Wortham & Son, L.P.** is sponsoring the Saturday lunch and providing one of the workshop discussion leaders. "Wortham is the 17th largest retail insurance brokerage and risk services firm in the United States. The firm was founded in 1915 and is headquartered in Houston, Texas. Our staff of insurance professionals is prepared to meet all of your insurance and risk management needs."

For the second year, **Robert Half Legal** is sponsoring editions of the College newsletter. The company is "the premier provider of project and full-time professionals for law firms and corporate legal departments. Robert Half Legal, which has offices in major markets throughout North America, provides highly skilled and experienced candidates for a wide range of positions and project teams within the legal field, including attorney, paralegal, legal manager and administrator, litigation support specialist, and legal secretary."

**Océ Business Services** has made an unrestricted contribution to the College. The company "provides complete

solutions for the management of documents and information, ranging from print and reprographics to mail services to records management to general office services. The combination of more than 20 years' experience, expertise in all office services categories, superior processes, best-in-class technology and well-trained, motivated people means we can make your organization more efficient and cost-effective."

### **Contributions Made by Fellows' Firms**

**Bell Gully** (thanks to Fellow **Maggie Callicrate**) will sponsor the Fall and Winter editions of the newsletter. The firm is "New Zealand's leading full-service commercial law firm, providing legal solutions that help our clients achieve their goals. The firm has the country's strongest legal team with over 250 partners and lawyers with experience and expertise in a wide range of business and government sectors. We combine leading corporate, commercial, financial and dispute resolution capability with a range of specialist practice areas."

**Dorsey & Whitney LLP** (thanks to Fellow **Silvia Coulter**) is helping underwrite the opening reception on Friday evening. The firm is "among the largest law firms in the world, with 20 offices strategically located. With over 650 lawyers and 750 support staff, Dorsey & Whitney shares the vision: to be a leader by leveraging our core strengths worldwide. These strengths include the exceptional talents of our lawyers, our expansive capabilities and the teamwork we employ in responding to our clients' needs."

**Foley & Lardner** (thanks to Fellow **Doug Boyd**) is also helping underwrite the opening reception. "Foley & Lardner is a highly regarded, national law firm providing client-focused, interdisciplinary services that result in high-value legal counsel for our clients. We have more than 60 practice areas encompassing the full range of corporate legal services, including corporate governance and compliance, securities, mergers and acquisitions, litigation, labor and employment, intellectual property and IP litigation, and tax. Our nearly 1,000 attorneys are recognized as insightful thought leaders on these and many other of today's most complex business issues."

**Nixon Peabody LLP** (thanks to Fellow **Harry Trueheart**) is sponsoring the Saturday night reception. The firm "is one of the largest multipractice law firms in the United States, with offices in 14 cities and more than 600 attorneys collaborating across 15 major practice areas. The firm's size, diversity, and state-of-the-art information systems enable us to offer a comprehensive, integrated range of legal services to individuals and organizations of all sizes in local, state, national, and international matters."

And to close the Tenth Annual Meeting on a memorable note, **Winston & Strawn** (thanks to Fellow **Dave Hambourger**) is underwriting what promises to be great entertainment. "For 150 years, Winston & Strawn LLP has

made it a goal to provide clients with the highest quality legal representation. Founded in 1853 by Frederick H. Winston, the firm is one of the nation's oldest and largest. With nearly 900 attorneys and offices located in major business centers around the world, including Chicago, New York, Washington, D.C., Los Angeles, San Francisco, Geneva, Paris, and London, we are well positioned to effectively serve our clients' needs in the global economy."

## Welcome to . . .

. . . the following Fellows-Elect who are planning to be inducted in September:

**Judy Anderson,**  
Chief Operating Officer  
Riddle & Wimbish  
Tulsa, Oklahoma

**David Bilinsky,**  
Practice Management Advisor  
The Law Society of British Columbia  
Vancouver, British Columbia

**Susan Boswell,**  
Administrative Partner  
Quarles & Brady Streich Lang  
Tucson, Arizona

**George Brandon,**  
Director of  
Practice Management Consulting  
Thomson Elite  
Los Angeles, California



**FOLEY**



**Bell Gully**

**NIXON PEABODY LLP**  
ATTORNEYS AT LAW

**WINSTON & STRAWN LLP**

**Ross Fishman**,  
Chief Exceleration Officer  
Ross Fishman Marketing  
Highland Park, Illinois

**Mark Greene**, Managing Director  
The Brand Research Company  
Catharpin, Virginia

**James Keane**, President  
JKeane.Law.Pro  
North Potomac, Maryland

**Christopher Murray**, Principal  
Gensler  
Washington, D.C.

**Ronald Staudt**, Professor of Law  
Chicago-Kent College of Law  
Chicago, Illinois

**Robert Vineberg**, Partner  
Davies Ward Phillips & Vineberg LLP  
Montreal, Canada

## **Masons, Glasgow, Scotland**

As "Market Disruptors," this firm, with offices across the UK, Europe, and the Asia-Pacific region, is recognized for creation of OUT-LAW, a hugely successful 5,000-page web site targeting those involved in IT and e-commerce. Today, the OUT-LAW brand includes a print magazine with readership of 27,000; an extranet-supported retainer arrangement for businesses too small to have in-house legal counsel; and OUT-LAW Compliance, a comprehensive legal review of web sites.

In the category of "Leader Ships," the judges found two law firms worthy of recognition:

## **The Law Chambers of Nicholas Critelli, p.c., Des Moines, IA**

The Critelli firm is a boutique with lawyers practicing both as US litigators and UK barristers. In a departure from traditional law offices, Critelli has designed a high-tech setting without individual lawyer offices. They worked with their architect to conceive a studio setting in which each of seven "studios" is wired with an internal video cable network. Each room represents one of the seven general tasks inherent to any litigation practice.

## **Wragge & Co., Birmingham, England**

In the world of large and complex litigation matters, a law firm's fee quote must be diligently controlled, and the client must be kept fully informed. Wragge & Co. has filed a patent application for its remarkable fee prediction and transaction management system. The technology increases profitability through a methodology that costs a legal matter scientifically, calculates staffing needs, predicts the number of hours and the seniority of lawyers required, and helps manage the transaction process.

## **InnovAction Award Winners**

In January 2004, the College of Law Practice Management, in concert with **Edge International**, launched the first of what will be an annual global search for ingenuity in the management of the practice of law. Designed to inspire creative thinking in a field known for an over-reliance on precedent, the InnovAction Awards were launched not only to identify effective innovation but also to inspire it through international recognition.

We were pleased to receive numerous entries from across four different countries. Our international panel of judges gathered on July 23, 2004, to review the submissions and determine their short list of candidates. We now announce four unanimous winners of the 2004 InnovAction Awards:

## Blank Rome LLP, Philadelphia, PA

Finally, in the category of “Knowledge Stars,” the judges recognize Blank Rome. With over 450 lawyers in 11 offices, the firm has implemented an interpretive educational programming methodology to approach professional development in a fun way. The firm has introduced a number of integrated initiatives: Connections, a formal mentoring program to support working relationships; learning aids such as “Find It,” a hand-held library research tool; a “Tip-Bit” Program that consists of technology information printed on candy bars; and a board game called “Anatomy of a Matter.”

While 26 percent of the entries received were in the “Client Service Virtuosos” category, intended to distinguish firms demonstrating innovation in client service or delivery of legal services, the judges determined that none of the entries attained the level of innovation required for the award.

The four 2004 InnovAction Award winners will receive their “NOVA” awards on September 11 at a special awards session during the Annual Meeting.

The College of Law Practice Management and Edge International thank the other sponsors of the four award categories: **Greenfield/Belser Ltd.**; **Baker Robbins & Company**; and **Microsoft Corporation**.

Additionally, the contribution of the **American Bar Association’s Law Practice Management Section**, the **Association of Legal Administrators**, the **Canadian Bar Association**, and the **PM Forum North America** as “Publication Partners” in this awards program were vital to the success of this year’s awards effort.

And, finally, the dedicated communications professionals at **Levick Strategic**

**Communications**, and the member firms of **TAGLaw** and the **MSI Legal & Accounting Network** were instrumental in helping promote the awards worldwide.

## Notes From Chuck



The Tenth Annual Meeting and Induction of the College in Chicago will once again provide fellowship among old and new friends, stimulating discussions, challenging new ideas, induction of new Fellows, great food and great times – some of the many reasons we hope you will join us.

The first-ever awarding of four InnovAction Awards will provide additional excitement this year. Under **John Cummins’** leadership, the Program Team has developed a dynamic Saturday program to stimulate Fellows’ discussion and collaboration. **Dean Levmore** of the University of Chicago Law School will challenge us, and we expect to induct ten new Fellows into the College on Saturday evening.

The Sponsorship Team has been successful in obtaining multiple sponsors to help underwrite various parts of this Tenth Annual Meeting, and this enables the College to enhance the quality of our Annual Meetings. Our sincere thanks go to the sponsors, and to **Jim Lantonio**, **Silvia Coulter**, **Harry Trueheart** and **Jan Waugh** for all their fund-raising efforts.

This Annual Meeting will also see a change of regime. I have been privileged to serve on the Board of Trustees since the inception of the College, and I have been honored to serve as President for the past three years. It’s time for new leadership to take charge, and I want to express my

deep gratitude for the opportunities the College has provided to me. It has been an outstanding journey with so many outstanding colleagues.

I am truly pleased that more and more Fellows are participating in the activities of the College, and I encourage all Fellows to do so. If you have a short article to publish or if you have news about yourself or another Fellow, please share it with the rest of us. If you have ideas about how to enhance the web site or help the College achieve its mission, do not be shy — raise your hand, send an e-mail, pick up the phone, just do it! Only with your active participation can the College be all that it can be.

Elizabeth and I look forward to seeing you in Chicago in September!

**Chuck Coulter, President**  
chuckcoulter@slhlaw.com

## Personal Insights — Introducing:



**Richard B. Turnbow,**  
Executive Director  
Capell & Howard, P.C.  
rbt@chlaw.com

While working and raising a family, I was able to cram a four-year college education into eight years and obtained a degree in accounting. I worked for a CPA firm and obtained my CPA certificate and knew that this was the career for me.

I moved into law firm administration accidentally. One day I didn't know what a law firm administrator was, and the next day I was one. In spite of some very significant bumps in the road, I have very much enjoyed this career field. I will know that I made the right career choice in 2009. My immediate reaction to the

world of law firms was, and 26 years later still is, how challenging law firm governance is and how easy it is to improve almost everything with normal good management practices and principles.

I think what I like most is the variety of tasks, personalities, challenges and venues. I have been employed in nine law firms and by ALA in seven states. I hate boredom, which is not a problem in my job. It is great to work with highly intelligent people at all levels who all have strong opinions about law firm governance and operations, and most everything else, and most of the time they are different than mine. Lots of supposed authority with so little real authority is the order of every day.

In the course of my work in law firms over the years, I have developed teaching materials in the area of law firm financial management and have enjoyed teaching these topics in Provinces in Canada, 42 states and the District of Columbia. I have met a lot of wonderful people and have enjoyed seeing much of beautiful North America. Most of the people I know in the area of law firm administration are associated with ALA. I have been an employee of ALA, missed only two of its annual conferences in 26 years, attended many other educational conferences and forums, and have benefited greatly from the education and associations. I intend to get more involved in the College of Law Practice Management and broaden the number of professionals I know and associate with.

On one occasion I found myself between law firm administration opportunities. I decided to try my hand as an over-the-road truck driver hauling temperature-controlled loads all over the United States. This short experience persuaded me to live a better life, inasmuch as I did not want to be

assigned in the life hereafter to that job. All of the states and cities I drove through during that experience sure look better from the ALA or College angle than from the truck-driving angle.

Probably the most significant negative I have experienced is watching the recreational activity of creating new definitions of activities that can be sheltered from taxation by the creation of new and imaginative programs.

I have enjoyed the talents of a number of excellent leaders throughout my occupational and professional activities. I will single out only one here. I had the opportunity to associate with **David Brezina** on a number of occasions, before and after his terrible accident, and enjoyed his personality and leadership.

*Editor's Note:*

*David Brezina was inducted into the College posthumously in 1999. Richard refers to a bicycling accident that occurred during Dave's year as president of the Association of Legal Administrators, which rendered him a quadriplegic. Dave completed his term as president but died a couple of years later. His wife attended the College's annual induction dinner that year and received his plaque. A number of Fellows have made contributions to the College in Dave's memory.*

## Book Review

by **Roberta Montafia**, Chief Marketing Officer, Day, Berry & Howard LLP

### ***Marketing as Strategy:***

### ***Understanding the CEO's Agenda for Driving Growth and Innovation***

by Nirmalya Kumar

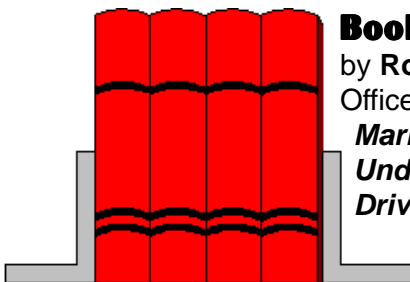
This book isn't specific to the marketing of professional services, yet the author's provocative stance on marketing's influence in the business world struck a chord with me. Kumar, a professor of marketing and director at the London Business School, has spent the past 15

years researching, writing and teaching marketing. To put his theories in context, he begins with a very brief look at the history of marketing in the corporate world — from its powerful rise during the boom of the postwar years in the 1950s to its present-day struggle to meet the challenges presented by globalization, commoditization and increased customer expectations.

Kumar's research reveals that marketing's ability to deliver value in the corporate world has greatly diminished. Yet he is optimistic as he firmly believes there has never been a better time for marketing to act as a change agent and play a major role in the success of an enterprise.

Of particular interest to this reader is Kumar's premise that marketers are doomed if they continue to revolve their efforts around a demonstration of return on investment. To avoid a surrender of its responsibilities, he urges a focus of energy on transformational initiatives that speak directly to the CEO's need for strategic leadership and are designed to increase profitability. He sees this shift as the only way for marketing to regain its share of voice. I view this as good news for law firm marketers. As marketing is only just finding its voice in the legal profession, we have the opportunity to learn from the corporate world and avoid the danger of becoming marginalized.

The bulk of the book is devoted to strategies that are designed to move marketing from "function to transformational engine" and, as a result, gain that seat at the boardroom table. Through detailed descriptions of seven "organization-wide transformational initiatives," Kumar provides a rich collection of examples and ideas for marketers who want to be innovators and lead their firms to success. Because the book does not address service marketing, law firm marketers will have



to bridge corporate concepts to the legal profession. However, as Kumar devotes a full chapter to each of the seven initiatives, it is relatively easy to see how his concepts could apply to law firms.

Chapter three, "From Selling Products to Providing Solutions," is a good example and one concept that should resonate with everyone as we all search for methods of differentiation. Kumar espouses the virtues of providing a solution crafted around client needs versus selling more product. He gets quite detailed in his use of examples from IBM, Hewlett-Packard, Akzo Nobel and others, and gives added value by introducing tools such as the "Solution-Selling Matrix" and "Customer Activity Cycle." In addition, he ends each chapter with a checklist.

You don't have to be a marketer to benefit from this book. Everyone entrusted with the business of their law firm is facing increased demands for performance. To meet these demands, we need to be aggressive in our thinking and look to other industries for lessons learned. Kumar gives us a wealth of

information to consider and adopt as appropriate for our individual situations. Even if are not inclined to read Kumar's book, you will probably find his website with its case studies, resources and newsletter worthy of attention. He can be found at [www.nirmalyakumar.com](http://www.nirmalyakumar.com).

## Post Your Publications

While on the topic of writings, be sure to take a look at what your fellow Fellows have written by visiting the Library on the College web site: [www.colpm.org](http://www.colpm.org). Thanks to the Communications Team — **Dave Ham-bourger**, team leader, and members **Maggie Callicrate**, **Simon Chester**, **Ron Friedmann** and **Sally Schmidt** — for gathering the current postings and to all Fellows who shared their works.



Do you have published articles you would be willing to post on the web site? Contact Sandy Geist for a submission form at [s.geist@comcast.net](mailto:s.geist@comcast.net).

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