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the Legal Connection

KEEPING LEGAL PROFESSIONALS CONNECTED

You Can't Do It Alone!

5 TIPS TO MAKE THE MOST OF YOUR ASSISTANT (VIRTUAL OR NOT)

1. Think of your assistant as your partner in the day to day business of law. Instill ownership and expect nothing less than absolute professionalism (in all forms) from anyone representing you and your firm.

2. Assess your strengths and delegate the rest. Tasks that are ripe for delegating include those items which routinely pile up or fall behind -- filing, billing and sending a follow up letter to contacts are perfect examples.

3. Document your processes. Simply put, until you know what it is that you do, you can't hand it off to someone else. Start with a simple list of what you do each time you encounter a repetitive task. For instance, when a client hires you - add information to case management and billing software, deposit check, open physical file, send "welcome to the firm" letter, add court dates to your calendar, etc.

4. Get the stuff out of your head. I read somewhere that speaking is seven times as fast as writing and four times as fast as keyboarding. Use your Treo®, Blackberry® or a **digital recorder** to free your mind of all the pesky little details as they come to mind throughout the day. At the end of the day, send the recorded file to your assistant for transcription and/or processing of the information as appropriate.

5. Communicate, communicate, communicate -- I cannot stress this one enough! Until your assistant works with you long enough to anticipate your needs, you're going to have to articulate them. But remember, communication is so much more than speaking. Along with telling your assistant what to do, you need to listen, stay calm and provide constructive feedback. The goal should be to improve the process or educate the assistant, not criticize or vent.

No one can succeed and remain successful without the friendly cooperation of others. ~ Napolean Hill

Want to learn to communicate better? Join Toastmasters International. www.legaltypist.com/Toastmasters.htm

Just published by Dan Pinnington of the ABA – How to Manage Your First Legal Assistant
http://www.abanet.org/lpm/lpt/articles/yl02081.shtml

SMARTER TECHNOLOGY
Experience Counts

TIME SAVING TIP

Ever visit a website or blog and the font (character size) is too small to read comfortably?

I just came across a great trick to resolve this issue. Next time you're on a page with a too small font, hit Ctrl and the plus sign (+) at the same time. It makes the font size go up one pitch each time you hit the combo.

If you go too big, just hit Ctrl and the minus sign (the key to the left of the +) to make the font smaller. ;)

The 5 Essential Elements of Every E-mail

By Judith Kallos

With every e-mail you have the opportunity to communicate with clarity. The onus is on you as the author to ensure that the intent and tone you wish to relay is what comes across to those you e-mail. And, with every e-mail you also run the risk of being misunderstood or giving a less than positive impression by not paying attention to detail.

Remember; in e-mail you loose the benefit of eye-contact, body language, a firm handshake or a smile. By taking the time to create e-mails that have these 5 Essential Elements firmly in place, you ensure your meaning is not detracted from while minimizing possible negative perceptions and misunderstandings.

Every e-mail you write should have these 5 Essential Elements covered:

1. The From Field: Your name needs to be displayed properly. John F. Doe. Not john f doe, or john doe, j. doe or no name at all and only your e-mail address. Proper capitalization is very important here. When your name is in all small case you open the door to being perceived a spammer or worse yet – lacking education or tech savvy.
2. The Subject Line: A short, sweet and well thought out Subject is crucial and in some cases can help to ensure your e-mail gets opened. Keeping your Subject to 5-7 words that accurately identify the topic and context of your e-mail is imperative. Feel free to modify the Subject field in ongoing conversations to reflect when the direction or topic of the conversation has changed.
3. The Greeting: Without a greeting at the beginning of your e-mail you risk being viewed as bossy or terse. Take the time to include a Hello, or Hi and the recipient's name. How you type your contact's name (John, Mr. Doe, etc.) is indicative of the level of formality your e-mail will portray. Be careful to not take the liberty of being overly informal too quickly. Let the other side dictate the level of formality and follow their lead. After all, formality is just another form of courtesy. You can usually get an indication of how those you communicate with prefer to be addressed by how they sign-off their e-mails.
4. The Body: Taking the time to communicate with clarity is time well spent. Complete, correctly structured and capitalized sentences that reflect proper grammar and punctuation are crucial to your message. Typing in all small case or all caps does not lend to easy communications and gives the impression you are either lazy or illiterate. Review and spell-check every message before clicking Send.
5. The Closing: Whether it be "Thank you for your time!", "Sincerely", "Look forward to hearing from you!" or "Warm regards," use what is consistent with the tone and objective of your message. By not having a proper closing you increase the possibility that your e-mail will be perceived as demanding or curt. Without exception close by including your name to put that final considerate touch to your e-mails.

Make the effort to integrate these 5 essential elements in every e-mail you send and you will contribute to the perception that you are tech savvy, courteous and a pleasure to communicate with. When it comes to e-mail its all about communicating with knowledge, understanding and courtesy!

About the Author: Judith Kallos is an authoritative and good-humored Technology Muse who has played @ http://www.TheIStudio.com for over a decade. Check out her popular E-mail Etiquette Web Site, Books and Free Tools @ http://www.NetManners.com

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3 Reasons You Should Remove E-mail From Your Processes

By: Andrea Cannavina, MVA

I'm sure the title of this article has some readers scratching their heads. *Remove e-mail? I just started using it - it's the wave of the future - I work with clients by e-mail all the time - My clients wouldn't hire me if I don't use e-mail.*

I've heard it all and I still say every business should remove e-mail from their processes where they can. Here's three good reasons:

1. Security Issues

I cannot stress this one enough. Any information you send in the content or as an attachment to an e-mail can be intercepted, reviewed and altered by the owner of the electronic equipment it touches - you know the wires, routers and switches that physically make up the Web. (Everyone forgets that the Web has a physical component.)

Is it LIKELY that someone is intercepting your communications? No. Is it possible? Absolutely! That's why you don't use e-mail to transmit things like credit card information, let alone attorney work product.

For attorneys, it's not just that confidential information can be intercepted. There are other hazards as noted by legal blogger Brian Ritchey, Esq. of **www.MorePartnerIncome.net**. On February 1st he published: *Unencrypted E-mails Between Attorneys and Clients May Not Be Privileged*. Along with the comments thereto, this is the best discussion I have seen amongst attorneys on the subject of security and e-mail.

2. Administration Woes

Business owners are required to save and store their business e-mails in the same manner as they do other business records. Over time, the data storage needs increase and the larger the business, the larger that cost in terms of actual server space plus the time that one pays (or puts in) to verify that the data is being saved, backed up, archived, etc.

Along with the storage aspect of e-mail, it is also difficult to keep an accurate client file. Although most firms **wish** to be paperless, the reality is, law is a paper intensive industry and will likely continue as such for many years to come (if not indefinitely).

Typically, e-mails are stored on a different network/PC drive/folder than client specific folders that store other records for that client. For instance, if you use Outlook, everything is stored in Outlook's .pst file. So how do you get a copy of e-mail messages into a client's electronic and paper files?

I run across the same solution all the time in law firms -- employees are required to print out each incoming and outgoing e-mail message to be placed within the physical file. Old fashioned? Certainly - but it works! The best configuration is to have employees print each incoming or outgoing e-mail to .pdf and save that .pdf to the client's electronic folder. Then print out a copy of the .pdf for the physical file. This way the client's electronic file and physical file are always in sync.

3. The Ooops! Factor

Security does not just mean that the e-mail messages your business creates are only read by the intended recipient. A recent Law.com article (http://tinyurl.com/3w48kt) reported on how a law firm inadvertently sent an e-mail to a reporter instead of to their client. That e-mail, of course, contained sensitive and confidential information. This is what I call the built in Ooops! Factor for e-mail. It is really just too easy to dash off an e-mail and hit send.

How many times do you check and recheck the e-mail address before hitting "send"? I check once when I'm drafting and it's the last thing I do before clicking on the send button. I don't just "look" at the address the second time. I literally read it out loud then click Send (a good practice to get into, IHMO).

Even doing this, I have done other stupid e-mail faux pas - like using the "Reply All" button to send a private communication to a whole list, instead of one member on that list. Thank goodness that's only embarrassing and not fodder for a law suit!

If you'd like to read about one alternative to using e-mail to transfer files over the web navigate to this page: http://www.legaltypist.com/sendthisfile.htm

Keep Track of Your Contacts

Even if you don't have a sophisticated case management system, you can keep track of client inquiries, appointments and conversions. Create a simple excel spreadsheet that includes:

- The name of the client;
- The date of the first contact with the client;
- The method of first contact (phone, email, etc.);
- How the client came to you (be specific - if a client saw a presentation or seminar you gave, which one was it? If they found you on the internet, did they find your website, your blog, or through an attorney directory? Who referred them to you)?
- If the client comes for an initial consultation, note the date of the consultation.
- If the potential client becomes a client, keep track of the date that they did so, the fee they're being charged, and the specific problem they needed you to address.

Review the spreadsheet at least monthly to determine which referral sources are most effective and to help you follow up with potential clients. The spreadsheet can help you focus on your best referral sources, improve your referrals from other sources, and keep in touch with potential clients that haven't yet become paying clients. It can also help you understand your sales cycle better so that you can plan better and improve cash flow.

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