

Amicus Attorney News

The Official Newsletter of Amicus Attorney

March
2003

Volume 1
Issue 3

amicusattorney.com

1. [What's New @ Amicus Attorney?](#)
2. [You Have to Try This!](#)
Practical Tips and Tricks from Amicus Attorney Certified Consultants
3. [Legal Tips](#)
Tips from Legal Industry Experts on How to Effectively Manage Your Practice
4. [Spotlight On...](#)
Highlighting a Feature of Amicus Attorney
5. [FAQs - Frequently Asked Questions](#)
Our Customer Service Team Provides Answers to Some Common Technical Questions
6. [Amicus Attorney Premier Consultants](#)
Training, Events and More!



We'll be at the
ABA Techshow -
April 3rd & 4th, 2003
Sheraton Chicago Hotel
& Towers Chicago, IL
Come and visit us in
Booth # 514 & 516.

The world's premier legal
technology conference
promises to be
a great event.

For more information
on the show:
www.techshow.com

FREE PASS

For a free pass to the
exhibit hall - [click here.](#)

1. [What's New @ Amicus Attorney?](#)

In January 2003, Gavel & Gown Software Inc. sold its 200,000th license of Amicus Attorney®.

"This is a milestone achievement for our company," stated Ron Collins, President of Gavel & Gown Software Inc. in a press release issued in late February. "A large part of our success to date can be attributed to our loyal customers who have consistently provided suggestions and feedback to help us evolve our product into the world class software it is today. We also have a fantastic team of independent certified consultants who install, train and support our software every day."

With over 200,000 licenses sold, Amicus Attorney is the world's leading practice management software. The first public release of Amicus Attorney was available in November 1994, one year after the company's incorporation.

For a full copy of the press release:
<http://www.amicusattorney.com/news&events/pressindex.html>.

2. [You Have to Try This!](#)
Practical Tips and Tricks from Amicus Attorney Certified Consultants



Viewing Details of Previous Calls & Using Callback Reminders *by Lori Berenson*

Viewing Details of Previous Calls

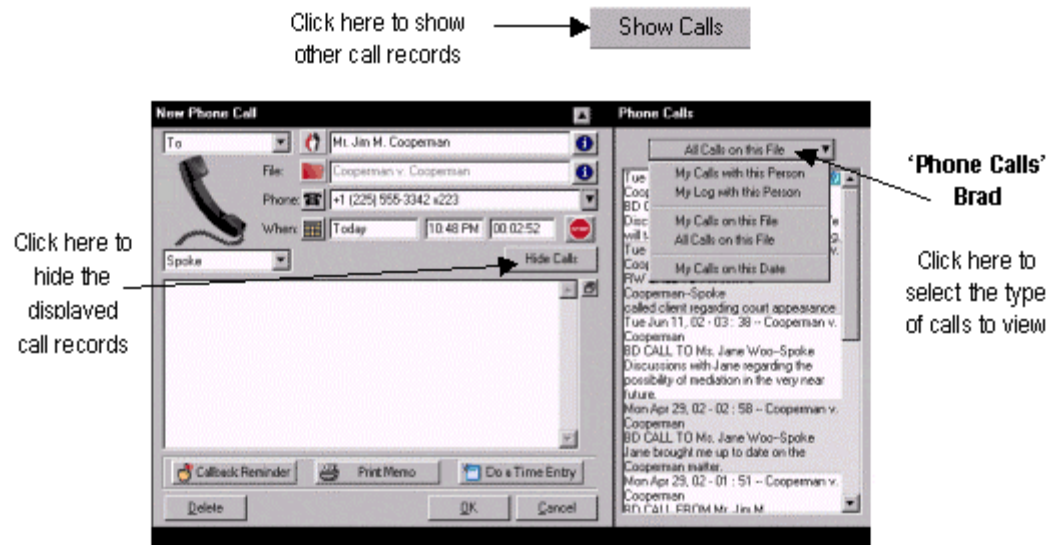
When initiating or receiving a phone call, you may find it useful to review previous phone calls with the same person or regarding the same file. With the Phone Call



We'll be in San Diego
April 7th & 9th, 2003
for the 32nd Annual ALA
Conference and
Exhibition. If you are
planning on attending
this event, come by
Booth# 845 to see us.

For more information,
[click here.](#)

phone calls with the same person or regarding the same file. With the Phone Call Details dialog box open, click the 'Show Calls' button under the 'Time' field to display: a) your phone calls with this contact, b) the related log with this person, c) your phone calls on this file, d) all calls on this file, or e) your phone calls on this date. The 'Show Calls' button then changes to a 'Hide Calls' button (as shown below).

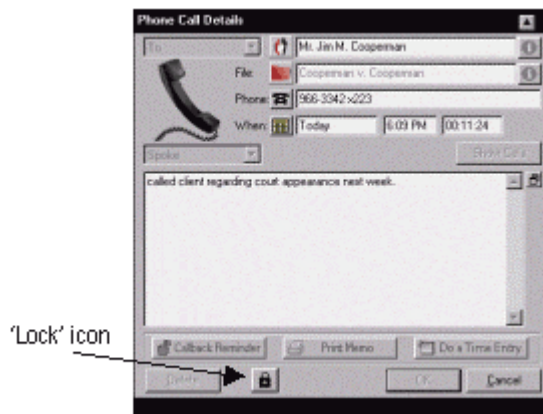


The log lists records of previous calls and messages, and shows basic information about each call or message. To view more details of a particular call or message, double-click on it from the 'Phone Calls' Brad. You may make any changes or just review the information. Click on OK to finalize the call record. Click on Cancel if you do not want to save the changes.

If you placed the call, then you can:

- edit the phone call details
- set up a Callback Reminder
- do a Time Entry
- print the call details

If another Team Member placed the call, most of the buttons on the window will be grayed out and there will be a 'Lock' icon at the bottom of the dialog box (as shown below). Then you are only able to view the call.



The 'Phone Calls' Brad heading allows you to select from the following list:

Brad Heading	Description
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The 7th Annual LegalWorks 2003 Conference and Exhibition is being held on April 22nd & 23rd, 2003 at the San Francisco Hilton and Amicus Attorney will be there in **Booth #501**.

For more information on the show, [click here](#).



Please feel free to pass this eNewsletter on to others who would be interested in receiving it.

[SUBSCRIBE HERE](#)

By simply clicking on the "Subscribe Here" button, they will also start receiving it in their inboxes on a monthly basis.


[Missed An Issue?](#)



For past issues of Amicus Attorney News - [click here](#).

My Calls on this File	Displays a list of your calls with any contact associated with this file
All Calls on this File	Displays a log of all Team Members' file-related phone calls (team environment only)
My Calls on this Date	Displays a log of calls you have made on the date of the phone call

Callback Reminders

When you leave a message for someone to call you, do you always remember to place a follow-up call if your call has not been returned? If you put the return call out of your mind (as many people do), the Callback Reminder will be a tremendous help to you. If you are placing a phone call, and a) the line was busy, b) there was no answer, or c) you leave a voice mail message or a message with a live person, you can set up a Callback Reminder. A new To Do event is created - all you need to do is select the appropriate date to call the person back - either later that same day, the next day, or any time in the future.

When the  button appears on your To Do list, you have the following options:

- delete the To Do if the person has already returned your call and you have recorded the call
- if you **have** spoken to the person but haven't recorded the call, click on the  button, change to the appropriate date of the call, and log any notes about the call
- if you **have not** spoken to the person, click on the  button to initiate the new phone call.

Compliments of:

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Productivity Consulting is a computer consulting firm based in Northeast Ohio, owned and operated by Lori Berenson. Since 1985, Productivity Consulting have offered consulting and training to improve office productivity - specializing in contact and case management for law offices. Customized training manuals are offered with most of their training and consulting services, and can be tailored to fit the needs of clients.

YOUR LEGAL LAUGH

Your monthly dose of humor...

In *Fisher v. Love*, the plaintiff sued defendant for driving his automobile into plaintiff's oak tree

In Fisher v. Lowe, the plaintiff sued defendant for driving his automobile into plaintiff's oak tree, damaging the tree. The Michigan trial court ruled in favor of the defendant and the Court of Appeals affirmed. Here is the court's actual opinion:

We thought that we would never see
A suit to compensate a tree.
A suit whose claim in tort is prest Upon a mangled tree's behest;
A tree whose battered trunk was prest
Against a Chevy's crumpled crest;
A tree that faces each new day
With bark and limb in disarray;
A tree that may forever bear
A lasting need for tender care.
Flora lovers though we three,
We must uphold the court's decree.
Affirmed.

The court's opinion prompted the usually staid headnote writers at West Publishing Co. to take their own poetic license. This one's worth checking out in the Northwest Reporter. I'm all in favor of adding some levity to judicial opinions, but what do you think the judges would do if a lawyer submitted a poetic brief? Admire his creativity? Laugh heartily. Chew him out, impose sanctions, refer him to substance abuse counseling?

- Fisher v. Lowe, 122 Mich. App. 418, 333 N.W. 2d 67 (Mich. Ct. App. 1983).

www.lawhaha.com

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Legal Tips

Tips from Legal Industry Experts on How to Effectively Manage Your Practice



When to Say No: 10 Ways to Select and Reject a Client

By Edward Poll, J.D., M.B.A., CMC

Client selection - and rejection - is the first line of defense against malpractice problems, but it has the added benefit of being a wonderful management tool for law firms. Articulated client selection procedures can: make the practice of law easier because you avoid the stress of a difficult client, minimize problems with fee collections or fee write-offs, and improve office morale by escaping the time and energy consumption caused by unreasonable and over-demanding clients.

A Client Selection Plan

Client selection starts by drawing up a "client intake procedures plan" and using it. Putting the plan in writing will lock it in your mind and give you something objective to review as often as necessary until you really feel comfortable with it. Stick to the plan; do not deviate from it without having a really good, objective reason.

With all potential clients, take time for a careful client interview. Discuss the client's expectations, discuss the client's case goals, discuss the client's previous legal system experience. Listen to any negative or unsettling reactions that you or your staff may have to the client or to the expectations of the client.

Be realistic in discussing your expectations with the client; do not embellish or low-ball the fee to hook the client. That may be worse for the lawyer than if the client left after hearing the projected reality.

Finally, send a written notice to the prospective client in the event of rejection of the case or matter; retain a copy for the firm's records. For proof of mailing, send the letter by certified mail, return receipt requested, or by messenger or courier, where appropriate.

When to Reject Clients

A plan for selecting clients should also include a section on when and how to say "no" to accepting a client. Here are ten considerations when deciding whether to accept or reject a client:

1. **Pay particular attention to clients who have last-minute emergencies or "life-and-death" matters.** Unless a firm has sufficient personnel or specializes in crises, this type of client brings inherent risks since time crunches often push work to less-knowledgeable or less-experienced personnel. Statute-of-limitation and time issues to complete the work and review it for correctness can increase a firm's risk of time-element malpractice claims, which comprise about 25 percent of all malpractice claims. Avoiding these last-minute emergencies is an important rejection tool.
2. **Beware of a client who is playing law firm ping-pong, or a client that moves from firm to firm.** This is an indication of the type of person who is really never satisfied with life but is very willing to blame their attorney for their discontent. This kind of chronic dissatisfaction may ultimately be a thinly disguised invitation to a summons and complaint for malpractice.
3. **Avoid a client with unrealistic expectations or demands and who believes that your estimates, whether of time or outcome or costs, are guarantees instead of informed estimates.** The client that expresses irritation with delay, who is chronically complaining about everything, who is demanding constant or instant attention, or who expects unrealistic or abnormal hand-holding might just be the alter-ego of the chronically discontented client who jumps from firm to firm.
4. **Watch out for clients who use pressure tactics.** Clients who demand that all other cases be put aside to handle their matter first are bound to be trouble. You can recognize this type of client by their unjustified stipulations that the suit be filed today, or that the matter be closed by the end of business. These clients usually overwhelm a law firm or attorney with phone calls over small details or by having to be constantly apprised of progress.
5. **Beware of clients with bad attitudes toward lawyers and the legal system.** Lawyer-bashing to your face, even if it is done in a joking manner, may show a hidden disdain or contempt for the law, for judges or for lawyers. These clients are people with whom it would be difficult to establish a bond of trust, and trust is the cornerstone of the lawyer-client relationship.
6. **Be careful when the client suggests that they know the process better than the attorney, or that they want the attorney to act as an automaton on their behalf.** A recent claim arose because the client's girlfriend had taken a couple of law classes in college and was telling the client to tell his attorney how to run the case. This client was not "in sync" with the attorney.
7. **Avoid clients who cannot articulate what they have come to the attorney to achieve.** There may be psychological needs or ulterior motives in seeking representation. Clients who are looking for revenge are unlikely to be happy with the limited results that the legal system provides. This may lead to disappointment and resentment that can be turned upon the lawyer representing them. This creates a perfect environment for a claim of negligence, and it points once again to the need for continuous communication between the attorney and the client.
8. **Watch out for clients who make legal fees and costs a major issue.** Suits against clients for unpaid legal fees are a prime source for malpractice claims. Clients who cannot or will not discuss or agree on fees, or who will not sign a fee agreement or pay a retainer should be suspect. Clients who want to start now and pay later, or nit-pick over the fee, may be broadcasting a subsequent fee dispute or claim. Rejecting this client before representation will minimize the aggravation of fee collection difficulties as well as claims.

9. **Do not take matters that are outside of your normal areas of expertise.** Cases in areas of law that the firm has little or no experience in should really trigger a client rejection. Taking a case for the learning experience could also include a lesson in insurance coverage and claim surcharges, particularly if the case is taken on an hourly basis and the client's bill is larger than what might be usual or customary for an attorney or a law firm with expertise in that same area.
10. **Look hard at clients who use other matters as an inducement.** When a client alludes to other work or other benefits in handling their case, it may be a sign that they know the downside of their case better than the attorney does. Promises to give a firm more business "down the road" or to supply lots of referrals or high profile visibility from taking a case is really just a sales pitch. There may be an even greater cost for the attorney when the payment of a deductible or higher malpractice premium is added to that equation.

While client selection may be only one factor in claims avoidance, it is a major factor. Too often, attorneys bemoan after a claim is filed, "If only I had understood the client, I wouldn't have taken this matter." Take more time in the initial interview and have more fun and make more money with the matters that you do accept.

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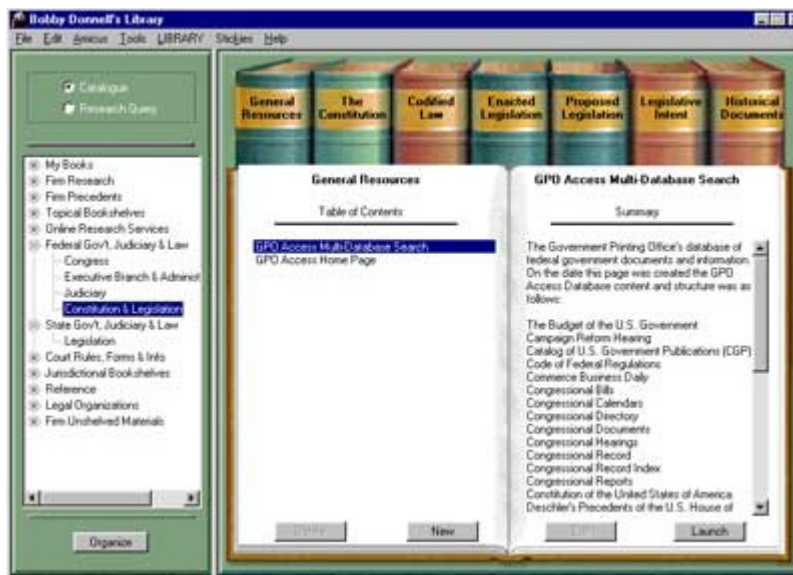
About the Author: Edward Poll, J.D., M.B.A., CMC, is a coach to lawyers and certified management consultant who shows attorneys and law firms how to be more profitable. Ed's latest book is Collecting Your Fee: Getting Paid From Intake to Invoice (ABA 2003); he is the author of Attorney & Law Firm Guide to The Business of Law, 2d ed. (ABA 2002); Secrets of the Business of Law: Successful Practices for Increasing Your Profits. To make suggestions or comments about this article, call (800) 837-5880 or send an e-mail to edpoll@lawbiz.com. You can also order a free e-zine or visit Ed on the web at www.lawbiz.com.



Spotlight On...

Highlighting a Feature of Amicus Attorney





zoom

Information stored in your Library can be integrated with your Files. Any research you conducted for a particular client can be saved to the client's File so you have it at your fingertips.

Within the Library module you can select and organize your information by category. Everything from internal precedents to external online services can be coordinated in a common place. In addition you can make the information available for use by the entire firm or you can limit its availability to you alone.

A powerful search mechanism allows you to sift through the Library and find anything that might be relevant to your current issue. Choose between a simple or a complex Query. Either Query includes the ability to search the full text of documents you've stored in your Library. Save your Queries so that they can be run again with the click of a button or used as the basis for creating new Queries. Once you have run a Query, double-click on any item in your Query results to open it.

External sources of information from providers such as Westlaw, Lexis or MediConnect may be accessed from Amicus Attorney. The Library facilitates the capture of disbursements for such services, and generates a usage log for simplified tracking. It can also automatically log you in to selected services, such as MediConnect, if you provide the Library once with your user ID and password.

The ultimate power of the Library comes from its ability to compile your information with that of others in the firm. To encourage its use, Amicus Attorney has provided a number of tools that make adding Library content a snap. An icon is automatically added to your word processor toolbar allowing you to save a record of any document to the Library. This means that as soon as you finish drafting that memorandum, you can save it to the Library with just one click of the 'Add to Library' icon on your Word® or WordPerfect® toolbars. If you are using Internet Explorer®, your web browser also has a button added to the toolbar allowing you to quickly save a web page to the Library.

You can dictate how much control any Team Member has over shared information in the Library. The Library recognizes two types of Team Members: those with Librarian status and those without. The difference between the two is the amount of control they have over the Library's organizational structure. Regular Team Members only have full viewing and editing privileges for their own personal Library materials and read only privileges for Library materials shared by your firm. Librarians on the other hand are those Team Members assigned to manage the Library materials available to your entire firm. They can change the contents and organization of your firm materials in addition to being able to modify their own personal Library materials.

If you have not yet used the full functionality of the Library Module, use the Tutorial Office to see how the Library can be structured. The Tutorial Office comes filled with sample data, so you can experiment, knowing that none of your own information will be affected. To do so, from your Office module select the following menu items:

Office > Open Tutorial Office > Tutorial with Sample Data



FAQs - Frequently Asked Questions

Our Customer Service Team Provides Answers to Some Common Technical Questions



Unlock All Data Function

Issue:

The following instructions describe how to use the Unlock All Data function through Amicus Administrator. Note: the Unlock Records feature, which is also available through Amicus Administrator, performs the same function but is user specific.

Cause:

Records (Files, Contacts, Phone Messages, Time Sheets, etc.) can be locked when Amicus Attorney is not exited from properly, gets shut down incorrectly, is interrupted during an exchange of information with an accounting system, or experiences a network interruption.

Solution:

1. Before proceeding with the unlocking of records, all Team Members must be logged out of Amicus Attorney.
2. Start up the Amicus Administrator and select Users > Recovery Functions > Unlock All Data.
3. You will receive a reminder that all Team Members must be logged out and a warning that the Unlock Data process might take a considerable amount of time to run. Click Yes to begin the unlocking process. This process can take anywhere from seconds to a half-hour, depending on the number of locked records and the size of your Database.
4. Launch a Team Member Office and all records should now be unlocked.



Amicus Attorney Premier Consultants

Training, Events and More!



Amicus Attorney Premier Consultants are professionals who are nationally qualified to sell and install all Amicus Attorney products and to provide their customers with on-site training and support.

TRAINING:

Here are some of the training sessions being offered by some of our Premier Consultants this spring. For more information or to register for a class, please contact the consultant firm directly. All times listed in EST unless otherwise indicated.

ProBill Law Firm Solutions

Boca Raton, FL

(800) 299-9177

www.probill.net

For more details, visit their [web site](#).

Date	Time	Training Session	Location
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April 29th, 2003	Session 1 - 9:00 am	Amicus "What's New in Version 5.1.1" and "Most Useful Features"	Morganville, NJ
April 29th, 2003	Session 2 - 1:30 pm	Amicus "Administrator Training v5.1.1 Customization and Backup Options"	Morganville, NJ

EVENTS:

APRIL 2003

Date	Event	Location	Consultant Firm
April 10th - 13th, 2003	Consumer Attorneys of California	Monterey, CA	Law Firm Technology Specialists www.tech4law.com
April 11th, 2003	Technology In Practice Seminar	St.Petersberg, FL	Technology in Practice www.tipseminars.com
April 24th, 2003	Georgia State Bar Association Technology Show - Case Management Software Discussion	Swisshotel Atlanta, GA	Best Law Firm Solutions www.bestlawfirm.com
April 25th & 26th, 2003	Association of Trial Lawyers of America (ATLA) - Boardwalk Seminar 2003 www.atlanj.org	Bally's Park Place Atlantic City, NJ	TQS Solutions www.TQSSolutions.com
April 30th, 2003	Technology In Practice Seminar	Charleston, WV	Technology in Practice www.tipseminars.com

MAY 2003

Date	Event	Location	Consultant Firm
May 9th & 10th, 2003	Georgia Trial Lawyer's Association Annual Convention	Swisshotel Atlanta, GA	Best Law Firm Solutions www.bestlawfirm.com
May 14-16th, 2003	New Jersey State Bar Association - Annual Meeting www.njsba.com	Bally's Park Place Atlantic City, NJ	TQS Solutions www.TQSSolutions.com

JUNE 2003

Date	Event	Location	Consultant Firm
June 8th - 13th, 2003	Louisiana State Bar Association Summer School and Annual Meeting	Destin, FL	Northshore Technology Center www.northshoretechnology.com
June 19th - 22nd, 2003	California Applicants' Attorneys Association	Monterey, CA	Law Firm Technology Specialists www.tech4law.com

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