

Amicus Attorney News

The Official Newsletter of Amicus Attorney

September
2004

Volume 2
Issue 9

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amicusattorney.com



Same architecture and interface as Amicus V with great new features and enhancements.

SPECIAL UPGRADE OFFERS IN SEPTEMBER

Call 800-472-2289

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

Introducing Amicus Attorney V+ ...

... the newest member of the Amicus Attorney Family.

V+ is an exciting new upgrade to the Amicus V platform. V+ utilizes the same architecture and user interface as the original Amicus V. In addition to all of the great functionality of Amicus V, V+ contains many new features and enhancements including:

- New Notes Module
- New E-Mail Notification – automatic notification of new events or changes to events
- Improved Calendar Reminders - Reminder alerts can now be set up to 7 days in advance.
- Palm® Enhancements
- Expanded Core Module Views – now supports 1024 x 768 resolution!
- Integration with HotDocs® 6
- Plus More.

For the month of September, we are offering some outstanding discounts off the regular upgrade purchase price. Call us at 800-472-2289 or e-mail info@amicusattorney.com to find out how you can save on upgrades to V+! These are some of the best upgrade offers we have ever made, so call today so you don't miss out on these outstanding offers.

Trying to decide between Amicus V+ and Amicus X?

Here's some help.

Both V+ and X offer numerous benefits to any law practice. With both you'll get easy to use, intuitive practice management software with the most natural workflow.

X is not a replacement for V, it is an alternative to it. X runs entirely through a browser



Browser-based!

The solution for firms that require the ultimate in accessibility!

Take our Feature Tour or call for details:
800-472-2289

Legal Laugh

Your monthly dose of humor...

[Missed An Issue?](#)

No problem. [Click here](#) to view or print from our past issue archives.

and is SQL based. It allows you to access your Amicus from anywhere you access the Internet. X is an amazing solution for firms that require the ultimate in accessibility, but not all firms have the technology infrastructure to support it. V+ is an excellent choice for smaller firms or firms who do not have a powerful server-based network.

[SUBSCRIBE HERE](#)

For detailed differences between the two products, visit: http://www.amicusattorney.com/products/prod_overview.html

Spotlight On ... *Highlighting a Feature of Amicus Attorney*



A few of the Highlights of new Amicus Attorney V+...

The Notes Module:

V+ has a great new Notes module that looks and works like a legal pad. You won't need those paper sticky notes anymore! Use this essential new tool for fast recording of any information you need - any fact or action item from a phone call to a date reminder.

Any note you record can then be cross-referenced to the appropriate File in Amicus so you have a permanent record of it. You can also convert a note into a phone call, phone message, e-mail, time entry, to do or appointment with one click. Turn your jotted down note into any type of record you need in your practice.

The Notes module will also help you manage your Sticky notes. Any of the items that you have recorded on your note pad can be sent as a "Sticky message" within Amicus Attorney to other users in your firm.

Notes in V+ can also now be stored as separate records and shown in lists for better organization. Sort them, see their dates, authors and more. The most flexible way to record and store information!

Appointment E-Mail Notifications:

Now in V+ change notifications can be sent via e-mail to appointment attendees. When a new appointment is created or deleted in Amicus V+, an e-mail will automatically be sent indicating the change. Not only will they be notified of changes to new or deleted appointments, you can also ensure that a change notification is sent when changes in Date, Time or those Assigned are made.

Enhanced Calendar Reminders:

Reminder alerts on Calendar appointments can now be set up to 7 days in advance. You'll never miss an appointment!

Palm® Link Enhancements:

V+ provides you with two great enhancements to the link between Amicus and Palm handheld PDAs – the ability to filter groups on exchange and the ability to map communication fields.

The new filters allow you to decide which Contacts you want synchronized with your Palm. For example, if you only want to exchange Clients and Lawyers, now you can. V+ also lets you decide what contact information you want to exchange with the Palm.

Expanded Core Module Views:

Now you can select how you would like to view Amicus Attorney on your screen. There are 3 different options to take full advantage of your screen size. Working with a larger monitor? Now you can expand your view in Amicus and get more usable space on the screen. View all core modules in full screen graphics with the new 1024 x 768 option.

These are just a few of the great new features and enhancements in V+.

For more details on upgrading to V+ visit: www.amicusattorney.com/upgrade2v+/ or call 800-472-2289.



Reaching Goals Through More Effective Leadership

By Nancy Byerly Jones

This article, which was originally published in the June 7, 2004 issue of Lawyers Weekly USA, has been reprinted with the permission of Lawyers Weekly USA, the national newspaper for small law firms.

Before continuing to read this column, please take a minute to think about some effective leaders from within your community. You may know them personally or just know of them. It does not matter if they are lawyers or not – just that in your opinion they are excellent and effective leaders.

Next, and with at least one actual leader in mind, create a list of at least fifteen characteristics that would describe that person. A small sampling might include: Are they good listeners, fair, patient? Do they have integrity? Are they good time managers and planners?

Please hold onto the list you've just made. We'll get back to it down the page a bit.

Your Firm's Leaders And Managers

Who are the leaders in your firm? The managers? Sometimes that's not so easy to answer unless, of course, you are a solo. Even as a solo, however, are you the real leader and manager on a daily basis or do you willingly and regularly pass those responsibilities to a staff member? Have you thought about the different responsibilities held by leaders and managers? How do those roles differ in your firm or do they?

Leaders vs. Managers

Leadership and management are indeed different concepts. Extremely simplified definitions of each of these terms follows.

A manager oversees and handles the day-to-day issues that must be addressed in order to carry out the firm's objectives (e.g. personnel issues, financial reports, computers and other technology, keeping up with and ordering office supplies, etc.). A firm's leader plays the role of visionary, change master, motivator and the "buck stops here" decision-maker for an office.

If leaders try to take on the manager's role as well, they risk spreading themselves too thin. They are also more likely to get so busy managing the day to day stuff that they fail to do the leadership-type of things they need to be doing for the long term welfare of the firm. This includes those matters that a firm's leadership needs to do such as creating short- and long-term action plans for the firm and ensuring that a productive and realistic marketing plan is being carried out.

Of course if you are a solo, you will be wearing both the leadership and manager hats by necessity (and both roles are just as important within the solo practice as it is in the larger firm). The wearing of dual management/leadership "hats" can be done quite successfully as long as solos know when to change hats during the course of a workday. That's not always so easy unless we truly appreciate and understand the critical need in every law office for an effective leader and an enthusiastic manager.

Reaching Our Goals Starts At The Top

Switching gears a bit and asking you to think for a moment about what your goals are for yourselves and your firms. Are you reaching your goals each year? Do you know what your goals are or do you primarily feel you must function in survival mode only? If so, you may also be thinking, "Who has time to sit down and make a list of their goals, much less make them happen!?"

Could your firm be defined as a threshold practice because you tend to take any and every case that crosses your threshold? Or, have you taken the time to design short and long term plans ("roadmaps") for yourself and firm? If so, you know that by doing so you have greatly increased the odds that every decision you must make - big or small - will be made with your "roadmap" of desired goals in mind. Therefore, each decision made will directly or indirectly

help you in moving steadily toward your goals.

It's easy to talk about our goals. Turning our aspirations and good intentions into reality, however, is the real challenge considering our 90 mph worlds. Just surviving one day at a time seems to be a worthy accomplishment and unfortunately in the midst of such chaos, many of our goals remain aspirations that never stand a chance of being brought to life.

There are ways to stop the vicious cycle and it begins at the top with good leadership.

Leadership

Many times we select leaders for our firms who are "in name only" leaders. These folks like the title but not all of the responsibilities that a true leader must bear. Sometimes it's just easier to put our heads in the sand than it is to face the anguish and exhaustion of making tough decisions (e.g. terminating unsatisfactory employees, etc.).

Unfortunately the "costs" of not facing the music are high and include such losses as lower productivity, increased malpractice risks and poor office morale.

Many good articles and books have been written about leadership and I encourage you to do your own reading about successful leaders and about what leadership is and isn't. For the purpose of this column, however, we will address only a few issues surrounding this critical but tremendously important subject matter.

Yesterday vs. Today's Law Firm Leaders

It is indeed much more of a challenge to be a leader in today's fast-changing legal environment and that's true whether you are a solo or a member of a much larger firm. It wasn't that long ago when one of the biggest challenges facing multi-attorney firm leaders was how to divide the pie fairly.

Further, we have a wider diversity among lawyers who are practicing together today that creates many benefits and challenges. We now have generational issues to face such as:

- older lawyers who feel you can't be a "real" lawyer unless you put in 80-plus hours a week and younger lawyers who insist on hanging onto a decent quality of life;
- lawyers who are not ready to retire, but whose younger partners feel they should be; and
- senior lawyers who seem not to care what happens to the firm when they retire or what kind of legacy they will be leaving behind them (e.g. they put off dealing with succession planning issues; they continue to horde their clients instead of helping to build a good bridge between their clients and the firm's younger attorneys, etc.).

In addition, today's young attorneys have issues to deal with that older lawyers did not. Some of those things include:

- the increase in competition which is also far more cut-throat competition in today's world – externally and internally in many firms;
- the absolute need for lawyers to be smart and savvy businessmen and women as well as excellent lawyers;
- higher client expectations and demands for immediate turnaround;
- decreased loyalty from firms to employees;
- decreased loyalty from employees to their firms; and
- a cancerous growth of "me-only" attitudes instead of team spirited attitudes and actions

Taking A Look In The Mirror

We're all pretty good about thinking we know how others could improve their personal interaction, communication and leadership skills. When, however, was the last time you took a good look in the mirror at your strengths and weaknesses? It's a good idea from time to time to stop your world long enough to conduct a mini-self audit regarding your leadership skills. A very short sampling of the questions you may ask yourself includes:

1. Do I have a realistic long-term plan/vision for my firm and has it been communicated clearly with all employees?
2. Do I set examples with my habits and behavior that are consistent with what I preach and demand from others?
3. Do I do a good job at keeping employees motivated?

4. Do I adapt to change well and enthusiastically or do I cling hopelessly to worn out systems and traditions?
5. What would others have to say about me as a leader (he's honest, fair, enthusiastic, a good listener, organized, a good communicator, decisive, has vision, follows through, etc.)?
6. If this were my last day at my firm, would I be leaving it with a solid, realistic and "doable" plan for its future growth and prosperity?

Staying Motivated And Motivating Others

If you are truly happy with what you do then it will radiate to all those with whom you work. If you are fighting chronic burn-out, unsatisfied with the practice of law and more frustrated than not with your work then this too will be felt by your peers and staff and such feelings can be highly contagious to say the least.

Motivating others is not as difficult as it may seem when we are truly in touch with the pros and cons of our own work assuming, of course, the positives outweigh the negatives. If this is not the case, motivating others is next to impossible because our actions do indeed speak so much louder than our words.

Motivational skills and leadership are inherently linked. Likewise, listed below are a few other suggestions for improving the leadership within your office:

- Make sure you have clear rules and procedures within your office and that they are enforced consistently and fairly. Nothing lowers morale quicker than attorneys within a firm having different rules and privileges for certain employees (e.g. an attorney who allows his/her assistant to consistently come to work late without repercussion while other staff members are expected to come in on time). This does not sit well with those who make the effort (and in many cases, special arrangements such as child care), to reach the office at the designated starting time each day.
- There's an old saying, "When I'm right who remembers and when I'm wrong who forgets?!? Make sure that when constructive criticism is needed that it is given in private. Likewise, make sure that you give praise openly when deserved -- a simple thank you goes a long, long way and is all too often forgotten in the shuffle of your many to do's on any given day.
- Resolve any underlying tensions among the partners or associates. I often hear attorneys say that no one else in the firm knows they have an unresolved "issue" with one of their partners. Not so! While others in the firm may not know just what the "issue" is, they do indeed sense, see and suffer from the tensions emitted by feuding attorneys. We humans will always have our differences and opinions, but we should practice good common sense to deal head on with any such disputes so that we can move on with life in a positive manner. To put our heads in the sand only enlarges the problem whatever it may be and sends out the wrong message to everyone else (e.g. it gives "permission" to the firm's staff to act in the same child-like manner of ignoring their differences and holding long-time and destructive grudges).
- Take care of yourself! We all know that without our good health, nothing else matters and yet, it seems like we continue putting ourselves last when it comes to healthy diets, time off and exercise. While common sense "ain't" always so common, it just makes good old common sense to take better care of ourselves and to encourage all those with whom we work to do the same. And yet, just the opposite happens all too often in too many firms. Not only do some folks not plan for and take the time to take healthy breaks from the office, they try (and unfortunately usually succeed) to make their associates and staff feel guilty for any sick or vacation days taken. Attorneys who act that way are shooting themselves in the foot because the best employees any of us can have on board are those who take care of themselves. There is no better recipe for success than to encourage your legal colleagues to maintain a healthy balance between their personal and professional lives.

Back To Your List

I asked you to make a list at the beginning of this column of the characteristics of an effective leader. I also asked you to highlight those attributes on the list that you felt you either did not have or need to improve upon. Now, please prioritize those characteristics to which you need to give some attention. Select two or three things from the list to start working on immediately.

Please keep this list where you can access it easily for the next thirty days and look at it often each day. That will

help you stay the course as you work toward strengthening that characteristic within your personal leadership skills. After you feel you have indeed improved in certain areas, move on to the next two or three attributes on your priority list. Work on those as long as necessary to make any needed changes stick and so on.

Once you have completed your entire list of improvements needed, is that all you need to do to be an effective leader? Of course it isn't. Learning more about what leadership is and isn't, however, and working on improving your own leadership skills is a big step towards ensuring that your firm's goals and aspirations become realities. Give smarter and more effective leadership a try. It sure beats the heck out of working amidst the chaos generated by a threshold-driven, out of control practice.

Compliments of:

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Solo attorney and certified mediator Nancy Byerly Jones practices law, mediates and arbitrates cases. She also heads up a law office management consulting firm in the northwestern mountains of North Carolina, where she and her husband reside on their mountainside horse and donkey ranch. Nancy is a regular contributor to Lawyers Weekly USA. For more information, please visit www.nbjconsulting.com, call (828) 264-1448 or send an e-mail to nbj@nbjconsulting.com.



FAQs - Frequently Asked Questions

Our Customer Service Team Provides Answers to Some Common Technical Questions



Error Message when trying to run any of the CallCenter Reports in Amicus V: “The database file XXX has changed. Use the Crystal Report Verify Database option to update your report.” Followed by “Error detected by database DLL”. (Applies to Amicus V users who have previously upgraded from Amicus Attorney Version 4.)

Cause:

In Amicus Attorney V and later, the CallCenter was renamed to the ComCenter (to reflect that it now handles all forms of communication, not just phone calls), however, the original CallCenter reports are not removed automatically when you upgrade. New reports are provided in a folder called ‘ComCenter’ that will pull the same types of information for the renamed module.

Note: If you wish to remove the Callcenter reports from your menus, you can do a search for the Callcenter folder on your computer and delete it.

YOUR LEGAL LAUGH

Your monthly dose of humor...



Compliments of: www.legalhumor.com.

5. **Amicus Attorney Premier Consultants** *Training 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 Programs Offered by our Premier Consultants:

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

CLASSROOM TRAINING

Best Law Firm Solutions, Inc.

Atlanta, GA

(770) 998-3800

steve@bestlawfirm.com

www.bestlawfirm.com

For more information, contact Best Law Firm Solutions via e-mail or phone.

Date	Time	Training Session	Location
October 7, 2004	8:30am - 12:00 noon	Amicus Attorney V and V+ workshop immediately preceding the start of the Georgia ICLE Small Firm and Solo Practitioner's Institute.	Savannah Marriott Riverfront Hotel Savannah, GA

Note: See event section for more details on the Georgia ICLE Small Firm and Solo Practitioner's Institute.

WEB BASED TRAINING

ProBill Law Firm Solutions

Boca Raton, FL

(800) 299-9177

www.probill.net

administration@probill.net

For more information, contact ProBill Law Firm Solutions via e-mail or phone.

Date	Time	Training Session	Location
Flexible Dates	9:00 am 11:00 am 1:00 pm 3:00 pm or 5:00pm Weekend and late nights available.	eClass Training (Web Based training) - <i>choose from:</i> Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take eclasses directly from your own computer.
September 29, 2004	9:00 am	TRN201 Amicus Attorney V - Basics Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
September 29, 2004	11:00 am	TRN202 Amicus Attorney V - Advanced Calendar Court rules, attaching actions to a calendar event such as generating a document or sending an email, working with the group calendar and more	Web based
September 29, 2004	1:00 pm	TRN203 Amicus Attorney V - Document Assembly Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
September 29, 2004	3:00 pm	TRN204 Amicus Attorney V - The Library Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
September 29, 2004	5:00 pm	TRN205 Amicus Attorney V - ComCenter Everything you need to know about managing emails in Amicus including attaching emails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based
September 30, 2004	9:00 am	TRN206 Amicus Attorney V - Timeslips Link Use Amicus Attorney to track your time as you work then transfer it to Timeslips for billing. Exchange contact information between the programs.	Web based
September 30, 2004	11:00 am	TRN207 Amicus Attorney V - QuickBooks Link Use Amicus Attorney to track your time as you work then transfer it to QuickBooks for billing. Exchange contact information between the programs.	Web based
September 30, 2004	1:00 pm	TRN208 Amicus Attorney V – PCLaw Link Use Amicus Attorney to track your time as you work then transfer it to PCLaw for billing. Exchange contact information between the programs.	Web based
September 30, 2004	3:00 pm	TRN201X Amicus Attorney X – Basics Setting up People, Files and using the Calendar, Telephone & E- Mail features.	Web based
September 30, 2004	5:00 pm	TRN202X Amicus Attorney X – Advanced Calendar Attaching actions to a calendar event such as generating a document or sending an e-mail, working with the group calendar and more...	Web based
October 1, 2004	9:00 am	TRN203X Amicus Attorney X – Document Assembly Merge information from Amicus Attorney into your documents while linking the document to a File for future reference.	Web based
October 1, 2004	11:00 am	TRN204X Amicus Attorney X – Library Organize your research materials for easy retrieval, i.e. word processing documents, spreadsheets, websites, paid services.	Web based
October 1, 2004	1:00 pm	TRN205X Amicus Attorney X – Communications Everything you need to know about managing e-mails in Amicus including attaching e-mails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based

Pricing: 1st attendee or class - \$99 US (\$139 CDN), 2nd attendee or class - \$89 US (\$119 CDN), each additional attendee or class - \$79 US (\$99 CDN)

Watch for Amicus V+ Training in October!

6. Events

Watch for Amicus Attorney at these events.



Some of our top Premier and local consultants will be at these Regional Events demonstrating Amicus Attorney. Stop by and get all of your Amicus Attorney questions answered!

For a complete listing of National and Regional Events visit www.amicusattorney.com/news/news_events.html

2004

Date	Event	Location
September 21, 2004	<p>The Cal Law Business Conference</p> <p>A one day conference filled with tactics and strategies to help small law offices run their practices like a successful business.</p> <p>For more information: http://www.law.com/jsp/ca/clb_conference092104.jsp</p> <p>2b1 Inc, Amicus Attorney Premier Consultants www.2b1inc.com</p>	Hyatt Regency San Francisco, CA
September 21, 2004	<p>TexLaw Management Booth #113</p> <p>Amicus Attorney will be exhibiting from booth #113 at this regional event that will focus on technology, firm management and support services.</p> <p>For more information: www.texlaw.com</p>	Belo Mansion and Pavilion Dallas, TX
October 7-9, 2004	<p>Georgia ICLE Small Firm and Solo Practitioner's Institute</p> <p>Nancy Duhon and Steve Best will also be featured speakers at the practice management shootout on Friday October 8 at 10:30am.</p> <p>Duhon Technology Solutions, LLC and Best Law Firm Solutions will be exhibiting at this event.</p> <p>Best Law Firm Solutions, Inc., premier Amicus Attorney consultant, will offer a 1/2 day Amicus Attorney V and V+ workshop in Savannah GA on October 7, 2004 immediately preceding the start of the Georgia ICLE Small Firm and Solo Practitioner's Institute. The workshop will be from 8:30 AM to 12:00 noon. To register please call (770) 998-3800 or to register on line, click: www.bestlawfirm.com/course.htm.</p> <p>Best Law Firm Solutions, Inc. www.bestlawfirm.com</p>	Savannah Marriott Riverfront Hotel Savannah, GA
October 7-10, 2004	<p>State Bar of California – 77th Annual Meeting & Exposition</p> <p>This event will feature CLE educational sessions and a vendor exhibit hall. Over 3,500 state bar members are expected to attend. 2b1, Amicus Attorney Premier Consultants, will be exhibiting at this event.</p> <p>For more information: http://www.calbar.ca.gov/state/calbar/calbar_home.jsp</p> <p>2b1 Inc, Amicus Attorney Premier Consultants www.2b1inc.com</p>	Monterey, CA

October 29-30, 2004	ALA Region 3 & 4 Conference For more information: www.alanet.org/education/conf.html InTouch Business Consultants will be exhibiting at this event. InTouch Business Consultants www.intouchbc.com	Sheraton New Orleans, LA
November 5-6, 2004	ALA Region 1 & 2 Conference For more information: www.alanet.org/education/conf.html InTouch Business Consultants will be exhibiting at this event. InTouch Business Consultants www.intouchbc.com	Disney's Contemporary Resort Orlando, FL

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