

Annual Meeting and Induction September 12-13, 2003 Washington, D.C.

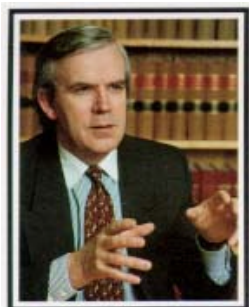


All in a DC Day

Saturday, September 13, promises to be full, challenging and enjoyable, so start gearing up for a day that will keep you going full-speed.

Start with breakfast at 8 a.m. and greet the Fellows you partied with at the opening reception the night before. Then it's on to the morning's program. Building on the past year's work of the College New Knowledge Task Force, Fellow **Simon Chester** will facilitate large and small groups in a lively brainstorm about the "ideal" law firm. Bring your clear mind, creativity and willingness to collaborate with some of the most forward-thinking people in the legal profession today.

Over lunch, you'll have another chance to get to know or get reacquainted with your colleagues, as well as have your creative instincts toggled by our speaker, Chic Thompson. A teacher and idea generator, Chic also is the author of *What a Great Idea*. Thanks to Fellow **Milton Zwicker**, a review of Chic's book follows. You will receive a complimentary copy of the book on September 13.



Milton W. Zwicker

What a Great Idea: Key Steps Creative People Take by Charles "Chic" Thompson

How would you describe to a potential client the services your firm has to offer? "We're experienced, competent, cost-effective and offer excellent services." In a recent marketing survey, these were the words Canadian lawyers used to describe their services. The responses show our lack of imagination and creativity. If we all say the same thing, how are clients to distinguish one firm

from another? I don't accept that we are all the same. But what can I do to set my firm apart from the many others? The answer: I have to become more creative.

From *What a Great Idea*, I now know it is possible to be more creative. The author says, "Creativity is the ability to look at the same thing as everyone else but to see something different." The idea that some people are born creative is a myth, he asserts. He puts this myth to rest because he discovered creativity is a process that we can learn. His book describes the process that he teaches.



Creativity, the author says, "consists of coming up with many ideas, not just one great idea. To come up with many ideas, you need an idea-friendly environment and idea-friendly times." Chic lists the ten most idea-friendly times on page 13 of his book. I bet you can't guess what is number one? Test your imagination? When you receive your copy of the book, guess what it is before you peek at the answer.

A versatile resource for anyone who wants to break away from old habits and start thinking "outside the box," Chic's book proves creativity is a process that we can learn and have fun at the same time. It's packed with ways to get your creative juices flowing. You will learn, for example, to recognize the impact killer phrases have on creativity and much more. If you want to foster an environment where creativity will flourish, study and apply the process to the challenges of this new century.

After Lunch . . .

. . . four gutsy Fellows have agreed to the challenge of provoking a lively

*. . . the collected
group will attempt to
walk the fine line
between chaos and
genius . . .*

discussion. **Sally Fiona King, Burkey Belser, Ron Friedmann, and Stephen Mayson** will stoke the fires of our collected minds with brief presentations – from their very personal points of view – on the question: “What should be obvious – but apparently isn’t – about the direction the legal profession now needs to take?”

Since every single survey of the Fellows reveals that what they really want from the College is the opportunity to talk about things worth discussing with colleagues, this afternoon session has been structured to do just that. Using a traditional conversation method known as a “Samoan Circle,” the collected group will attempt to walk the fine line between chaos and genius in response to the provocation of Sally, Burkey, Ron, and Stephen.

Want to know more about these brave souls? Check out their info at www.colpm.org.

And Into the Night

Around 4:00 on Saturday afternoon, you’ll be given a little free time to relax and get all dressed up in your formal attire for the evening’s festivities. Cocktails will be served at 6:30 and dinner at 7:30. Then we will welcome and recognize the following new Fellows who are currently scheduled to be inducted this year:

Sandra J. Boyer, Principal
and Managing Shareholder
AndersonBoyer Group
Ann Arbor, Michigan

Ross Fishman, Chief Exceleration Officer
Ross Fishman Marketing, Inc.
Highland Park, Illinois

Camille Grabowski, Marketing Manager
The Affiliates
Menlo Park, California

J. Larry Green, Principal
and Senior Consultant
Bradley Huggins Consulting Group
Athens, Georgia

Mark T. Green, Managing Director
The Brand Research Company
Catharpin, Virginia

John S. Kirk, Director of Administration
Manko Gold Katcher Fox LLP
Bala Cynwyd, Pennsylvania

Carl A. Leonard, Consultant and
Director of The Hildebrandt Institute
Hildebrandt International
San Francisco, California

C. Richard Loftin, Attorney at Law
Nantucket, Massachusetts

Roberta Montafia,
Immediate Past President
Legal Marketing Association
Chicago, Illinois

Michael E. Palmer,
Director of Administration
Akin Gump Strauss Hauer & Feld LLP
Los Angeles, California

Linda J. Ravdin, Attorney at Law
Pasternak & Fidis, P.C.
Bethesda, Maryland

Norm Rubenstein, Partner
Zeughauser Group
Washington, D.C.

Tomasz Wardynski, Partner
Wardynski & Partners
Warsaw, Poland

Ellen Wayne, Dean of Career Services
Columbia Law School
New York, New York

Red Alert

Our block of rooms at the Park Hyatt Hotel **will be held only until August 15**, so to be assured of a room at our group rate of \$220/night, make arrangements now if you haven’t already done so. Call

for reservations at 1-800-778-7477 or book online by going to this web site – <http://parkwashington.hyatt.com/groupbooking/claw>

Please note: this online booking instruction differs from the instruction on the meeting notice.

Online Meeting Survey Results

A 50 percent response rate ain't bad!!! Over half the College Fellows replied to the online survey distributed in the Spring newsletter. Not only was it fun and interesting to complete, it provided VERY useful information regarding your plans for the September Annual Meeting and Induction weekend in September. Wondering about the responses? Here's a summary:

- 61 Fellows took the time to click on the link and respond
- 43 percent attended the 2002 meeting in Dallas
- 77 percent plan to attend the meeting in D.C.
- 62 percent plan to bring a companion
- 4 percent plan to bring children
- 74 percent plan to stay at the Park Hyatt Hotel
- 76 percent are interested in a performance by the Capitol Steps
- 67 percent would attend the Capitol Steps even if they have to pay their way

[Note: Unfortunately the hotel is unable to provide the space needed to present these entertainers, and our schedule prohibits us from getting our group to their theater. Perhaps another year and place.]

Might this online method be helpful in gathering feedback or information from your clients or partners? Check it out at www.Zoomerang.com. And, of course, there are lots of other sites offering this service for free, as well.

Speaking of Online Surveys!

Several Fellows have told us they think the Zoomerang survey tool is pretty nifty, so we've decided to keep our idea exchange going through a survey in each issue of the newsletter. If you've got a spare moment, click on this link and answer a couple of questions regarding the practice of law. We'll compare notes in the next issue. <http://www.zoomerang.com/survey.zgi?40PWV5KQKPBMOlyGFFNcX0Q8>



Chuck's Notes

Fellowship among the Fellows, old friends, new friends, stimulating discussions, challenging new ideas, induction of new Fellows, great food, great times – some of the many reasons we hope you will join us for the Ninth Annual Meeting and Induction in Washington, D.C., September 12-14.

The program on September 13 will provide great opportunities for Fellows to collaborate and exchange ideas, our speaker at noon will help us all become more creative, and 14 new Fellows will be formally inducted into the College Saturday evening.

The Sponsorship Team has been successful in obtaining multiple sponsors to help underwrite various parts of this 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, Lowell Rothschild, Harry Trueheart, and Jan Waugh** – and to **Merrilyn Tarlton** – for all their fund-raising efforts.



The Communications Team is getting ready to launch the College's revised and reorganized web site at www.colpm.org "real soon now." Check it out about August 15. The searchable database and other new features are significant improvements. Thanks to the Team of **Dave Hambourger, Sally Schmidt, Simon Chester, Ron Friedmann, and Maggie Callicrate**, and to consultants **Sarah Ewalt and Laurie Dewey** for making it happen.

More and more Fellows are participating in the activities of the College – Annual Meeting programs, newsletter material, web site development, fund-raising. As I have said at least once before, the College can be all that it can be only with the active participation and contributions of the Fellows.

If you have a short article you would like published or if you have news about yourself or another Fellow, please share it with the rest of the Fellows. If you have ideas to enhance the web site or how the College can achieve its mission, do not be shy – raise your hand, send an e-mail, pick up the phone, just do it!

Elizabeth and I look forward to seeing you in D.C. in September!

Chuck Coulter, President
chuckcoulter@slhlaw.com

Thanks Again and Again . . .

. . . to our generous sponsors. Their contributions help enhance the services and programs we provide to you, and we believe they should be recognized whenever possible. Many thanks to:

Association of Legal Administrators – \$2,000; and **ALA/Capital Chapter** – \$500; to underwrite the luncheon at the 2003 annual meeting.

John L. Wortham & Son, an insurance broker for professional liability services – \$2,500 to underwrite the 2003 Annual Meeting luncheon speaker.

Martindale-Hubbell – \$6,000 to underwrite the 2003 induction dinner.

Levick Strategic Communications – \$500; and **Greenfield/Belser, Ltd** – \$1,000; to underwrite the pre-departure breakfast in D.C.

Gensler & Associates – \$1,500 to underwrite the College web site.

The Affiliates, the legal staffing division of **Robert Half International, Inc.** – \$1,000 to underwrite production of the College newsletter.

Personal Insights – Introducing:

Carol Phillips,
Administrator
Sidley Austin
Brown & Wood
Los Angeles,
California



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

A: This is an interesting question because I, like so many other legal administrators, didn't actually decide to "become one." From the first grade on, I planned to become a teacher. I was working on that goal in the '70s and worked in a law firm doing a little bit of everything while attending school. In that decade, law firms were much smaller, computers were just around the corner, and few firms had managers. I was in a firm of about 15 lawyers, but

they did have an office manager. She decided to leave and the partners asked me if I would “help out” in management until a full-time manager was recruited. I told them I would help, but only if they actively recruited someone as I didn’t think I wanted to be a manager.

Much to my surprise, in a very short time, I found the role of law firm manager to be challenging, with opportunities to work with people and be creative about solutions. After about three months of “trying it out,” I decided it was a profession that offered great potential for advancement. That was right at the time I was able to convince the partners to create a new department (word processing) and have highly experienced word processors handling the lengthy work that secretaries had done.

That sounds like the dark ages now, but it was really a new idea and was met with skepticism by most of the partners. I was lucky that an outstanding secretary in the firm agreed to take on the role of lead word processor, and she helped market the idea by doing great work on the really fast IBM mag card machines. This experience gave me a glimpse of the opportunities possible in a growing, changing professional services firm.

The work of legal management intrigued me, and I decided I liked the field better than education, so I finished my undergraduate education with a B.A. in English and immediately enrolled in an MBA program. I thought about law school, too, but felt my background and skills were well suited to management. I also thought about management in another industry as an option, but when I met managers from other industries in the MBA program, I was amazed at the narrow scope of their responsibilities. My fellow students couldn’t believe that I could be responsible for finance, human resources, facilities and the practice

support departments. So, I knew I had been fortunate to be in on the ground floor of a new world of management.

Q: Describe something special from your experience in the legal profession.

A: In over 20 years of legal management, I have been fortunate to work with many interesting, motivated staff members, with interesting and varied backgrounds. Many of them decide to go off into other fields or industries, and hearing about their successes in their endeavors has always been rewarding, especially when they come back and mention something I might have done or said that helped them in some way.

I know teachers have this experience with their students. Just last month, one of my former secretaries let me know he had completed his Ph.D. in organizational psychology! While working with us, he was promoted to a position in the firm as the human resources manager and did a great job of working with people (and also acting as the MC for our holiday parties).

Steve had a B.A. in drama and had come to Los Angeles to find his fame and fortune in the movies. While that didn’t work out, his ability to study human character and perform provided a great background for working with people. A few weeks ago, he told me he had finished the program, so we had lunch to celebrate the completion of his doctoral studies.

During the lunch, Steve told me that he decided to further his education because of my encouragement. He said when I gave him a book on *How to Simplify Your Life*, it was the catalyst that led him to look at his life goals and decide he should focus on furthering his education. I gave the same book to nine other

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supervisors and had no idea that it would provide a road map for Steve to move on to greater challenges. I think this is a great story because we should all keep in mind the sometimes-small things we do can influence others in a very positive (and sometimes big) way. We probably do not know how often that happens. I feel fortunate that Steve told me his story, which reminded me that small things do matter and to remember to do them.

Q: What do you do in your spare time?

A: As Chuck Coulter knows, I love to play tennis! My game is a “work in progress” that motivates me to work out to move faster on the tennis court and to watch the pros as often as possible to form a mental picture of what they do. In January of this year, I was able to attend the Australian Open, had great seats, and saw fabulous matches, with Andre Agassi, the Williams sisters, and Martina Navratilova just inches away. We even saw the record-setting match between Andy Roddick and Younes El Aynaoui, which lasted over five hours (until 1:00 a.m.), a five-setter with the fifth set score of 21-19. The number of games in the fifth set was the record-setter. The tennis they played was at an amazingly high level the whole time.

I have now attended all four Grand Slams (U.S. Open, Wimbledon, Roland Garros and Melbourne), so it's now time to start on the super 9s (Rome, Monte Carlo and other great places). I play a couple of times a week (singles and doubles), and my goal remains to beat Chuck at singles. Our last match in Torrey Pines, CA, was close (at least I think it was), which gave me encouragement to keep practicing.

I do hope others have a passion besides work. It doesn't take a lot of time to do something fun, but it sure does give me a fresh perspective on my work.



Lowell Rothschild
Mesch Clark & Rothschild
Tucson, Arizona

*[Editor's Note:
The following profile is excerpted from a delightful article written in 1995*

by Jesse Greenberg for Caveat, a Mesch Clark & Rothschild publication.]

Q: The thought occurs to me that you must look back over the past 43 years [of law practice] with amazement. Comparing who you were then with who you are now, the growth and success of the firm... Your face tells me you're a pretty happy guy. Are you?

A: It's been very fulfilling. Good relationships. From time to time I've contributed something to the practice of law. It's given me the opportunity to make a contribution to the community. It's been - I would say it's been a high privilege.

Q: How did you meet [your wife] Anne?

A: She's from Maryland and came to visit Tucson soon after she finished college. She was dating a roommate of mine. He went out of town and I looked in his address book and called her. That was it: we met on August 2nd, got engaged on October 2nd, and got married on February 10th. She is a very special person, very important to me. She's bright and she's patient. I mean the practice of law tends to feed one's ego. Everybody needs a leveler from time to time. She's good at it.

Q: Is there such a thing as an extra-curricular activity for you?

A: I bowl on Wednesday nights. I bowl



with five or six men, the same ones for the past 20-25 years. We bowl in a league and in city tournaments, state tournaments, and the national tournament.

Q: How good are you?

A: Well, I used to be much better than I am now. But I'm the captain, so they let me stay on the team. I call it my personal therapy. What I like about it is that when I put on my shirt with my name on it and go down there, it's what I do between the foul line and the pins that's what's important. There are no status games about outside activities. Nobody cares that I'm a lawyer. We are there to bowl. Period. It's a different side of my life I'm very comfortable with.

Q: Your career has obviously led you into many different arenas. Looking back, what would you change, if you could?

A: Well... I think I took my responsibilities so seriously that I took on this hard, cold exterior. Changing that style over the years has been one of my goals. I'm warmer, more receptive to my clients and associates now. I haven't changed my attitude toward my business, but I've softened the way I deal with people. That's my personal stuff.

What would I change about my practice? Probably nothing. It's been good to me and my family. I've had good partners – unusually good. They've been unusually loyal. I value our partnerships and our friendships. Looking back, I don't think I would change a thing about my professional life.

Q: What have you learned?

A: I've learned that there's still room for me to learn, to improve my professional skills and how I serve my clients. As I said earlier, I've learned to listen better than I used to. I enjoy that part of my

practice, the learning, the challenges. I still get excited about a new case coming into the office. I'm a lucky guy – I happen to like what I do.

[Editor's Note #2: Lowell reports that he is now in his 51st year of practice – and still likes it.]

Some Lessons for Law Firms from Southwest Airlines and Herb Kelleher

by Robert Denney,
Robert Denney
Associates, Inc.



Two of the most famous and respected CEOs in American business retired two years ago – Jack Welch at General Electric and Herb Kelleher at Southwest Airlines. They were respected not just because their companies were successful (there are many successful companies), but because they were smart and effective leaders.

Herb Kelleher was (and still is) a particular favorite of mine because I have flown Southwest many times and have experienced first-hand the philosophy of the airline and the attitude of its employees. When you fly on Southwest, it isn't just transportation. It's an experience. And the more you learn about Southwest and the way Herb ran it, the more you realize why it's the most profitable airline in the industry and one of the world's most admired companies.

Everyone can learn some lessons from Southwest and Herb about good management. But, since you all are part of the legal profession, you may wonder what you can learn from an airline. In the case of this airline – and *only* this airline – plenty! Herb's and Southwest's management philosophy transcends the

industry and can improve the performance of any law firm, even – and perhaps more so – in this uncertain environment.

Strategy and Culture

Southwest's operating strategy has never been rocket science, but it has always been unconventional. When the other major airlines were all doing one thing (such as creating big hubs), Southwest was doing something different (flying point-to-point). Instead of wearing stuffy uniforms, Southwest flight attendants wear khakis and polo shirts. Rather than buy many different kinds of aircraft, Southwest flies only one type of plane. This strategy reduces costs. It also increases safety and provides more flexibility for crew and flight schedules.

Lesson for law firms: Don't copy other firms. Do something smart and different.

Thanks to Herb, Southwest has always kept focused on its strengths. It could buy bigger jets, assign seats and fly non-stops coast-to-coast. But then it would be trying to do what the other major carriers already do, rather than what it does better than anyone else.

Lesson for law firms: Stay focused on your strengths and what you do well.

Many companies have tried to replicate Southwest's operating strategy without understanding the power of its unique culture. At Southwest, culture is not accidental. It's something people work hard at every day. Southwest hires for attitude and trains for skill. It expects its employees to think and act like owners of the business.

Lesson for law firms: Work hard at developing and nurturing a culture where everyone accepts responsibility

for the firm. Recruit – attorneys *and* staff – for attitude as well as skill. Then keep training them.

Dedication and Vision

From the very beginning, the people of Southwest have had an uncompromising dedication to the vision Herb inspired – not to be the biggest airline, but “To provide great service at low cost.” That's pretty simple. No fancy or high-sounding phrases here. But it takes work – hard, continuous work. And by their dedication to achieving and maintaining that vision, Southwest's people – *not* just Herb Kelleher – have made it a great business.

Lesson for law firms: Define your vision, then pursue it relentlessly. Everything else will fall in place.

Quotes from Herb on How He Did It

“Prepare for every scenario. The way I've always approached things is to be prepared for all possible scenarios of what might happen. Manage in good times so that you're ready for bad times.”

Lesson for law firms: Particularly right now, expect and be ready for problems. Ask – and answer, “What if . . . ?”

“Act fast. The way you have to be in the airline business is ‘ready, fire, aim.’ If you take too much time aiming, you never get to fire. You've got to move quickly; if you don't, someone else is going to.”

Lesson for law firms: Don't just analyze and plan. Make decisions and act.

“Listen to your customers and employees. Showing respect for

Many companies have tried to replicate Southwest's operating strategy without understanding the power of its unique culture. At Southwest, culture is not accidental.

people's ideas is very important. As soon as you stop doing that, you stop getting ideas."

Lesson for law firms: Constantly seek client and employee feedback. Then act on it.

"You have to treat your employees like your customers. When you treat them right, then they will treat your outside customers right."

Lesson for law firms: Treat staff and attorneys like clients.

In the final analysis, leadership has always been more than just one person. Extraordinary business success is always the result of smart and gutsy leaders working with their people to create something better than they could accomplish on their own. That's maybe the biggest lesson we can learn from Southwest Airlines and Herb Kelleher.

A Final 2003 Meeting Note

On pages 2 and 3, we noted information on how to book guest rooms at the Park Hyatt. It's simple to do. Now we want to urge you to stay at the Hyatt rather than anywhere else in the D.C. area. Planning a meeting involves the guessing game of how many guest rooms to block for your group, and we pay a stiff penalty if all those rooms are not used. The Park Hyatt is a lovely facility and all of our events will take place there, so please think Park Hyatt.



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