

T H E P R I M E R U S

Paradigm

A new model for lawyers and law firms

FALL 2009

Law Firms in the New Economy

Perspective from In-House Counsel

Primerus Leads the Way

Complete Membership Directory

President's Podium

John C. Buchanan



Leading the Way

In my 45 years of practicing law, I have never experienced anything like the economic changes that have unfolded over the past year. I have witnessed, along with all of you, the deterioration of the entire global financial system and the rippling effect on nearly all industries, including the legal world. I have read with sadness about law firm layoffs and cutbacks – and in some cases, even firm closings.

We are left to wonder where we as attorneys and law firms are headed in these new economic times. Gone are the days of excess. What is emerging for the legal industry, and for all industries, is a demand for lean and efficient business practices. In the wake of corruption and questionable business practices in some sectors, our customers are searching for honesty and for trusted business relationships.

Tried and True Values

The way of the future is the way Primerus has done it all along, following the tried and true values represented by the Six Pillars:

- Practicing law with **integrity** and handling all situations ethically
- Always providing clients with an **excellent work product** of the highest quality
- Charging **reasonable fees** and offering clients the best value possible

- Working every day to improve ourselves through **continuing legal education**
- Conducting ourselves with **civility**, even in what has become an increasingly uncivilized world
- Taking time to help others through **community service**

The companies who have done it right in the past and who will survive long into the future follow the core values from which Primerus firms have never strayed.

What is emerging for the legal industry, and for all industries, is a demand for lean and efficient business practices.

Primerus has grown faster in the last year than ever before, despite the struggling economy. We represent a phenomenal opportunity in the legal profession now and in the future as long as we continue to conduct business the way we always have – offering high quality legal services at reasonable fees and following the Six Pillars.

Cut the Fat; Not the Muscle

As you stay the course during this economic storm and navigate any possible financial challenges, I urge you to remember this is a time to cut the *fat* and not the *muscle* of your firm.

Maintain or increase your marketing budget (muscle) to get more good clients and good business in the door. Demand excellence and hard work from all of your team members. Increase the quality of your service to the very highest of standards and increase the level of communication with and appreciation of your good clients. Don't take your clients or their business for granted.

Like everyone, our clients are watching the bottom line now more than ever. Keep your rates at a very reasonable level, and don't be afraid to give your clients some freebies by not charging for every phone call or quick piece of advice – the meter doesn't always have to be running. Establish multiple and excellent banking relationships and never fund partner or shareholder compensation out of borrowed funds.

As shown by our tremendous recent growth in membership, the values on which Primerus stands resonate now more than ever. By adhering to the Six Pillars and continuing to offer the best possible value to our clients, Primerus will continue to thrive. Primerus leads the way into the future.

A handwritten signature in black ink, appearing to read "John C. Buchanan".



Every lawyer in Primerus shares a commitment to a set of common values known as the Six Pillars:

- Integrity
- Excellent Work Product
- Reasonable Fees
- Continuing Legal Education
- Civility
- Community Service

For a full description of these values, please visit www.primerus.com.

In this issue

Just as Primerus is growing, so too is *The Primerus Paradigm*. We are very pleased to present to you the first 40-page issue of the magazine. In just over a year, *Paradigm* has doubled in size from 20 to 40 pages, offering you more member articles that provide useful tools for you and your firm. We're also thrilled to welcome guest authors Teresa Kennedy and Robin Sangston of Cox Communications, Inc. to this issue.

If you have suggestions for future issues of *Paradigm*, we would love to hear them. Please send them to Managing Editor Chad Sluss at csluss@primerus.com.



About our cover

Much like the sands in the desert, the legal landscape is shifting beneath our feet. Primerus represents a tremendous opportunity in the legal profession now and into the future because of our commitment to offering high quality legal services at reasonable fees.



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The Way of the Future: Law Firms in the New Economy

In these tumultuous economic times, every day brings news of the shifting legal landscape. And while there's no denying or escaping the change, law firms are left gazing into their crystal balls to determine what exactly is happening, how it affects them, and where the future leads.

It seems industry experts agree one trend is undeniable – buyers of legal services are demanding more value for their money than ever before. So what do the much-publicized woes of big law firms mean for the future of small to mid-sized firms such as Primerus members?

And what management principles will guide Primerus members through these tough times?

Demanding More Value

The 2009 Chief Legal Officer survey, conducted annually by Altman Weil, Inc. (www.altmanweil.com), revealed that corporate law departments will decrease their use of outside counsel in the next year, according to a June 30 press release from the organization. Forty percent of the 183 survey respondents said less work would go to law firms this year, up from 26 percent last year.¹

When asked to rate how much pressure corporations are putting on law firms to change the value they offer, as opposed to simply cutting costs, 25 percent rated the pressure as high, 37 percent rated the pressure in the mid-range, and 38 percent rated it low. However, when survey respondents were asked how serious law firms are about changing their delivery model, only 5 percent said law firms were highly serious and 75 percent said law firms have little or no interest in change.

"This is a dramatic vote of no confidence from chief legal officers," said

Altman Weil principal Dan DiLucchio in the press release. "Either many law firms just don't understand that clients today expect greater value and predictability in staffing and pricing legal work, or firms are failing to adequately communicate their understanding and willingness to make real change. In either case, it's a big problem."

In another Altman Weil survey, conducted in November 2008 of 115 general counsel nationwide, about 75 percent said their law departments are facing budget cuts in 2009.

About 65 percent of general counsel said that they would bring more legal work in-house to save money, 53 percent would switch some current work or give new work to lower-priced outside counsel, and 50.5 percent will require more alternative fee arrangements.²

Altman Weil principal Charles "Biff" Maddock spoke in a recent interview about the general counsel of one major corporation (a global household name) who was under the dictate to cut outside legal spending by 70 percent. "That makes life very difficult for buyers of legal services," Maddock said.

The Cost of Legal Services

Results of the *National Law Journal's* 2008 billing survey showed that the average firm-wide billing rate at the nation's largest law firms was \$363 per hour, compared with \$348 in 2007. The survey was based on information provided by 127 law firms that responded to billing questions submitted as part of the NLJ 250, the *National Law Journal's* annual survey of the nation's largest law firms.³

The most expensive hourly rate in the survey came from New York City-based White & Case, which reported that the high end of its partner rate was \$1,260 per hour. The firm's average partner billing rate was \$747 per hour. This is the same firm that was the subject of a June 7 *New York Times* article titled "A Study in Why Major Law Firms Are Shrinking." After already laying off 70 attorneys and closing offices in Bangkok, Dresden and Milan, in March the firm laid off another 200 attorneys.

In June, Primerus set out to measure how its member firms' billable rates compare with other firms. When asked, "How does your firm's hourly billing rates compare to the large law firms' hourly billing rates in your local/regional market?" here is how Primerus members responded:

- 60 percent of respondents said their rates were 21 to 40 percent lower
- 13 percent said their rates were 41 to 50 percent lower
- 15 percent said their rates were more than 50 percent lower.

Primerus President John C. Buchanan said this information is important because it shows that member firms are living by one of the Six Pillars that calls for reasonable rates. But, he said, even more important is the quality of service offered by Primerus firms.

"Not only do Primerus firms offer reasonable rates, we offer the very best attorneys in the country. We consider only law firms who are AV Rated by Martindale-Hubbell Peer Review, and then we conduct an extensive screening process including interviews with past and present clients, and reviews of bar association investigations and insurance history," Buchanan said. "In many cases, we offer experienced partner-level service for the same or less than a client would pay for an associate at a larger firm."

Buchanan added that clients who work with Primerus law firms have the assurance they are dealing with attorneys of the highest integrity and who are specialists with extensive experience in their area of expertise.





The Way of the Future: Law Firms in the New Economy

Opportunity for Small to Mid-sized Firms

Maddock agreed that the onus on law firms today is about much more than cutting costs – it's about offering better value, including service, partner level interaction and predictability. He said he sees “tremendous opportunity” for the mid-sized firm that can do just that.

Maddock said firms that are less expensive, and in addition, have excellent experience, a good reputation with clients and in court, and great referrals from clients, will do well.

“Those firms who assume they will do well just because they’re cheaper, won’t,” Maddock said.

Bob Weiss, president and founder of Alyn-Weiss & Associates, Inc., in Denver, Colorado said the rapid regionalization and nationalization of business in the past presented a great opportunity for national and super-regional law firms to emerge. “But as the overreaching and overbuilding that businesses do in good times presents itself, the law firm models that were built to take advantage of those business models have begun to run into trouble,” he said. “More efficient models for delivering legal services are really being

sought out and in many cases, it’s an opportunity for the local and regional firm to reassert its value proposition in terms of lower rates and direct partner contact.”

On May 22, the *Philadelphia Business Journal* published highlights from a panel discussion of law industry insiders

There’s no question that the small firms, like Primerus firms, can perform services on par with the finest law firms at a lower cost – not only at a lower billable rate but also a higher value.

following the closing of one of the city’s oldest and largest law firms, Wolf Block. In response to a question about whether the large law firm model is sustainable, Carl Singley, a former Temple University law dean as well as former counsel at Wolf Block, said, “I think the essential operating premise for large firms is a flawed business model now.... My prediction is there’s going to be an increasing development of the so-called specialized boutiques and clients will go to those people. They’re not going to go to the mega-firms and pay these huge hourly rates when they can go to a small firm.”⁴

Andrea E. Utecht, general counsel for FMC Corp., said, “I think there’s a disconnect between cost and value. The idea of having these high-priced associates who are really very inexperienced doing the work in an inefficient way and then passing the costs on to the client – I think the trust is broken between firms and clients.”

Buchanan said more and more clients are seeking out high-quality, boutique specialty law firms. “There’s no question that

the small firms, like Primerus firms, can perform services on par with the finest law firms at a lower cost – not only at a lower billable rate but also a higher value.”

But, Buchanan said, simply being an unaffiliated law firm, regardless of quality, is not enough to attract attention from general counsel. “Companies want a well-known high-quality brand they can rely upon. That’s where Primerus comes into play,” he said. “What Primerus brings to the equation is the value of acting as a matchmaker between clients and 130 small



to mid-sized firms across the country which we spend a tremendous amount of time finding, screening and monitoring to ensure they are all Six Pillar law firms. We work hard finding these gems."

Seizing the Opportunity

To take advantage of these opportunities, Maddock urges small to mid-sized firms to identify what makes them different from other law firms and to emphasize that to clients. "They have to be known for something and there have to be things that they won't take on," Maddock said. Firms also must target inefficiencies within the firm and do something about them, he said.

For a network such as Primerus to have value to firms and clients, it must ensure that members strictly adhere to the Six Pillars and to the network's high standards. "The idea of having a level of consistency and quality among all members of the network is important. If Primerus has been able to do that, that's a good thing," Maddock said.

Weiss urges attorneys to get back to the basics of the attorney-client relationship. "What's important is how well you manage your relationships, how

responsive you are, how well you take care of your clients," he said. "That's the way it was 50 years ago and that's the way it will be in 50 years."

Primerus member firm Christian & Small in Birmingham, Alabama, this year took the opportunity to conduct a review of its marketing budget. LaBella Alvis, the firm's marketing partner, said the firm did a thorough analysis and surveyed each attorney about what organizations he or she belonged to. The firm then used that information to develop an organized plan that ensured every organization was covered without duplications.

"Now we are getting much more bang for our buck," Alvis said. "All organizations nationally and locally are covered, and we are not wasting our expenditures."

Each attorney also must submit a personal marketing plan to Alvis and she then uses that plan to evaluate attorney expense requests. "People are thinking much more about what they request," she said.

Alvis believes mid-sized firms like Christian & Small are much more adaptable to the changes in the financial environment, and that bodes well for them in the future. "I think the smaller firms are in a better position to make

choices to become lean and efficient for various reasons," she said. "There's less red tape, there's less bureaucracy, and there's less fluff to have to cut back on."

John McBride, managing partner of Ball Eggleston in Lafayette, Indiana, agrees. "Smaller firms have a significant advantage. We're more flexible. If you run into tough times, it's like trying to turn around a fishing trawler as opposed to turning around an ocean liner," McBride said. "We can make adjustments by having a couple of meetings and then getting started."

Ball Eggleston prides itself on its personal service, McBride said. As they touted in a recent ad campaign for their personal injury services, he said, "When you call me, you get me. Not a paralegal, not an assistant. You get me. That's one of the things you can do as a small firm." □

¹www.altmanweil.com/index.cfm/fa/r.resource_detail/oid/8bc7ca9a-3e76-45f6-8054-289150d9ef2b/resource/Chief_LegalOfficers_Dont_Think_Law_Firms_Are_Serious_About_Change.cfm

²www.altmanweil.com/index.cfm/fa/r.resource_detail/oid/a6766e0b-37d3-4478-b505-f989a4e5bd78/resource/75_of_Law_Departments_Face_Budget_Cuts_in_2009.cfm

³www.law.com/jsp/article.jsp?id=1202426547201

⁴philadelphia.bizjournals.com/philadelphia/stories/2009/05/25/focus1.html

Best Practices



Teresa T. Kennedy
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Teresa T. Kennedy's responsibilities include providing legal counsel to Cox's Programming Department and to Cox Media (Cox's advertising sales subsidiary). Teresa currently serves as a member of the Association of Corporate Counsel (ACC) National Board of Directors. She is past president of ACC's Georgia Chapter.



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Perspective from In-House Counsel: Finding Value and Trust in with Outside Counsel

By Teresa T. Kennedy and Robin Sangston

As members of in-house legal departments, we all dream of finding the perfect outside counsel. We dream of someone who thoroughly understands our respective roles, our budget and our company's culture. We dream of finding a true partner and someone we know we can trust. And we dream of someone who provides significant business value in everything they do for us.

That word – *value* – has become the focal point in recent dialogue about relationships between in-house counsel and outside counsel. In fact, the Association of Corporate Counsel (ACC) has placed the spotlight on the issue with its ACC Value Challenge. I (Teresa) have been involved with the ACC for more than a decade and currently serve on its board of directors.

The association created the Value Challenge because of the long-held belief among many that there is a profound disconnect between what clients (including in-house legal departments) want and need from law firms and what we pay for. On the flip side, the Value Challenge recognizes that law firms face increasing financial pressures and that any solutions will come from reevaluating the entire financial model at play on both sides of the equation.

In the words of the ACC: "Believing that solutions must come from a true dialogue and a willingness to change things on both sides, the ACC Value Challenge is based on the concept that

firms can greatly improve the value of what they do, reduce their costs to corporate clients and still maintain strong profitability. Our task is to help shift the discussion to a focus on value and to find solutions that work for all sides."

In order to find those solutions, the Value Challenge seeks to promote dialogue among corporate counsel, law firms and law schools; develop methodologies and metrics to assess the strengths and weaknesses of legal providers; create tools that in-house counsel and firms can share to drive change; and enhance awareness and communicate success stories.

Since its launch two years ago, the Value Challenge has made great progress. It has been very well received from all parties involved – I believe because its intention is not to tell law firms they're charging too much; rather, it recognizes that everyone involved would benefit from significant changes in the legal services delivery model.

The Value Challenges calls on all of us to start by doing three simple things: Meet. Talk. Act. It encourages us to schedule an informal lunch with our three best clients, law firms, practice groups or individual lawyers. Then talk openly about what changes can enhance the value of what both outside and inside counsel can do. Then pick a few ideas to try out.

At Cox Communications, we have tried several new things as a result of the Value Challenge. First, we experimented with fixed monthly fees in order to obtain

Relationships



counsel on a particular matter, such as an employment matter. We are able to use this fixed retainer amount to have questions answered, and it has been very successful for us. We also have outsourced some commodity work, such as repetitive contracts, at reduced or fixed rates.

Cox also is hosting a lawyer from an outside law firm in house for six months, and we sent one of our lawyers to work for three months in the office of an outside law firm to offer exposure to a wide array of legal issues impacting clients in a variety of industries.

Cox also has found great value in legal service delivery by working through the Primerus network. We have found that by nature, smaller firms such as those who participate in Primerus have always been more flexible in terms of rate structure and in terms of alternate arrangements to increase value. They have been a better value simply because their rates were

not as high. Also, their associates are on a much faster learning curve because they are thrown into the mix very quickly and develop skills that are valuable to clients very fast. Smaller firms probably have to change less about their existing structure to offer value to clients.

The reconnection of value to legal services has become a much more pressing issue given the current economic climate. It's no surprise that corporate counsel is under increased pressure to reduce costs and find better value in their outside legal service delivery. The silver lining to such a poor economic situation is that it gives us all added motivation to change. We should act on those opportunities and not let them slip away.

I urge in-house counsel and outside counsel alike to visit the ACC's website at www.acc.com to gather ideas for how to start finding solutions. ■

Some Likes and Dislikes of Inside Counsel

Likes

- Concise, practical advice
- Understanding of business challenges and opportunities
- Timely response – Return all calls the same day, even if you don't have an answer
- Proactive notification of potential issues
- Partnering with us on non-billable matters (e.g., intern visits, not charging for the law firm's seminars)
- Periodic social meetings
- Assign the right lawyer to the right task
- Sensitivity to cost
- Making me look good to the client

Dislikes

- Suggesting terms or negotiating positions that are impractical given our bargaining position or business realities
- Multi-level reviews and/or lack of bench strength that delay response time
- Being billed for non-substantive or clerical matters
- Bills with little detail as to work done and large bills with no advance warning
- Not consulting with me before undertaking certain tasks, especially considering forms that may already exist
- Repeated requests for conflict waivers
- Sales pitches

Best Practices



Robert E. Brown
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Robert E. Brown is a founding partner and CEO of Boylan, Brown, Code, Vigdor & Wilson, LLP. He practices tax law and business succession planning, with a particular emphasis on Employee Stock Ownership Plans.

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The End of Law Firms As We Know Them?

By Robert E. Brown

We have been witnessing a meltdown of the global economy unprecedented since the Great Depression. The very ideals that shape the American vision of a capitalist economy have been shaken to the core, as several of the companies that form the backbone of our financial system have been effectually nationalized in order to avert the utter collapse of the global financial markets. As stories of multi-million dollar bonuses for the CEOs of bailed-out corporations, private jets flown to Congressional hearings, and million-dollar company retreats began to proliferate at the height of the meltdown, “accountability” became the buzzword of both the media and the newly-minted Obama administration. Business, not-for-profits and governments have been forced to take a hard look at the books and trim spending wherever necessary in order to ensure their solvency and maintain credibility with shareholders, employees and the public. For many organizations, one of the largest line items in their annual budgets is the legal department.

For many years, the legal industry has operated under the “it ain’t broke” philosophy. The traditional partnership model of law firm structure, the reactionary delivery of services, charging by way of the billable hour and many other old-school methods have survived largely unchanged for decades. Why? Because clients are the driving force for change in any service industry and, until now,

they have accepted the status quo. The call for accountability in America has become the impetus for change among service providers and law firms are now finding their industry in a state of revolutionary change.

One of the biggest complaints that clients have voiced is the reactionary nature of the legal industry. Attorneys often wait to be called on by their clients when a problem or opportunity arises. Case in point: note the recent proliferation of the “financial crisis task force” or the “troubled business practice group.” Clients want their counsel to be proactive in their representation, rather than reactionary. They want their attorneys to obtain and maintain an in-depth knowledge of their particular businesses and industries so as to not only protect them from potentially disastrous situations (i.e. the past 18 months), but also to support their growth. The “if I’m thinking about your business, I’m billing you for it” mindset of the traditional law firm will not survive under these client pressures. It is a cost that will readily be absorbed by firms who realize that their success is directly tied to the success of their clients, and therefore accept and embrace this new philosophy as the fundamental nature of reality and the cost of doing business in the 21st century.

Although many clients still prefer to be charged by the hour, we have certainly seen an increase in requests for alternative billing arrangements in order to



stem the rising cost of legal services. This begs the question, “Does alternative billing simply mean lower the hourly rate?” Cost is, of course, the bottom line, but predictability and budgeting are really the key drivers here. Clients are not asking firms to simply reduce hourly rates in order to cut costs, but rather for firms to manage themselves better in order to produce quality in a more efficient manner.

These pressures will inevitably hit at the very structure of the traditional partnership model of a law firm. If clients are driving change in the legal industry,

doesn’t it make sense that the law firm should actually operate like a business itself? As clients streamline their operations in order to remain profitable, so too will law firms who wish to remain competitive while maintaining their profit margins. Clients will no longer tolerate the cost of inflated associate salaries or those of unprofitable partners being passed down to them through increased billing rates.

As in any industry, market pressures and changes in the business environment will force law firms to adapt to a new reality. In order to keep pace with those changes and maintain viability, continuous

innovation will serve as the key driver for growth. Forward-thinking firms will thrive in an ever-evolving economic reality. Market flux drives innovation, and innovation drives organizational change. Only through that deeper organizational change will law firms be equipped to meet the demand for a new, client-centric business model.

So, are traditional law firms dead? Of course not – but they will undoubtedly look much different in the coming years. The mega-firms will still be able to charge \$1,000/hour for “bet-the-farm” litigation work and command tens of millions of dollars for a single large transaction. However, the onus has been placed on law firms to rethink their business models and practices in order to address the call for accountability from their clients.

Because of their size and flexibility, small and mid-sized firms have a tremendous opportunity to influence the future of the legal industry. As a founding partner and CEO of a mid-sized law firm, I have certainly felt the unease and uncertainty that has infiltrated our everyday lives during these challenging economic times. However, I am also excited for the opportunity to shape the future of the industry that has been so challenging and rewarding for me, and to improve it to the advantage of those who are truly responsible for my success – my clients. □

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Best Practices



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Interesting Times: Some Dos and Don'ts for Difficult Times

By David L. Applegate

"May you live in interesting times" is an ancient Chinese curse, it's been said, and today lawyers live in interesting times indeed. Having weathered the 1981-82 recession with scarcely a blip and the late 1980s with only a bankruptcy or two, the legal profession now finds itself in uncharted financial territory.

A national law school honors degree or law review position is no longer a job guarantee. Partners without business are given the boot, and revenues and profits are down across the board. Large firms refrain from hiring, defer start dates for newly-hired attorneys, lay off attorneys and staff, farm out newly hired attorneys to in-house positions at drastically reduced salaries, and cut attorney salaries from top to bottom. Particularly painfully, a scant few years ago many of the same firms were raising salaries and granting bonuses that bumped first-year associate compensation to as much as \$200,000 per year.

And yet the alarm clock is still ringing, with many firms and lawyers not yet fully awakened or out of bed. Most large firms and many mid-sized ones are still built as pyramid schemes with the billable hour at their base. The continuing theory seems to be that if lawyers only continue annually to raise their rates and their billable hours quotas enough, then they will not only stay in business but also increase their profits. But it ain't gonna happen. The time has come instead for an uncomfortable

truth: law firm financial thinking needs a fabled "paradigm shift."

So what can and should law firms do in these interesting times, not only to stay afloat, but also to build their businesses for the future? Let me modestly suggest the following 10 commandments.

1. Keep talented people happy.

This is Commandment Number One for the simple reason that another old adage is also true: good help is hard to find. Not every promising newcomer pans out, but it doesn't usually take long to find out who is truly talented and motivated enough to succeed, from the people in the mailroom to the people on the front lines with clients and in court. Once you do, keep your people happy, challenged and motivated at every reasonable cost. If that means taking home a smaller bonus or foregoing a raise this year while revenues are down to ensure that your best associates, administrative assistants, mailroom workers and messengers are rewarded, then so be it. Because if you don't follow Commandment Number One, then you can't possibly follow Commandment Number Two:

2. Keep your clients happy.

The only reason this isn't Commandment Number One is because you can't keep your clients happy if you don't first retain your most talented people. But once you've satisfied Commandment Number One, you should do everything reasonable you can, in the words of singer-songwriter Paul Simon, to "keep the customer

satisfied.” This means not only returning phone calls promptly and keeping clients informed, but most of all, understanding their financial, business and emotional needs. It also means following the Commandments below:

3. Get real with rates.

Most of us meet new and impressive lawyers every day, but very few lawyers this side of Clarence Darrow (and he’s dead) are genuinely worth \$1,000 an hour or anything close to it. Yet large national firms routinely charge \$700, \$800, \$900 or more per hour for doing work that thousands of other lawyers around the globe can do equally well. Can you really justify a dollar every four seconds to a General Counsel who just had to lay off 10 percent of her staff or to a plant manager who is forced to fire another engineer for every \$100,000 in legal fees he has to pay for that large case you’re handling?

4. Implement alternative billing.

Most lawyers can’t afford to take every case on the basis of a contingent fee, but some matters may be suitable for flat rates and others may lend themselves to reduced rates with a bonus based on results or to blended rates, stop-cap billing, or “not to exceed” budgets. Particularly with large cases, discuss with your client up front how you can bring the most bang for the buck – but please don’t agree to a discounted rate and then double-bill for your time; it’s not only unethical but also bad business.

5. Cut costs carefully.

You can’t control your revenues, but you can control your costs. Yet don’t just slash and burn. The accountant in you may think that you can save money by canceling the firm picnic, but you’ll lose a lot more than that in employee morale and productivity. (See Commandment Number One.) Instead, follow Commandment Number Six:

6. Eliminate waste.

The laws of thermodynamics say that you can never achieve this entirely, but if you don’t aim for the stars then you’ll never hit the moon. Despite the computer revolution’s promise of the paperless office, for example, paper and photocopying remain huge expenses for most law firms (although some law firms have tried to turn copying into a profit center, with limited success and to client chagrin). Educate your employees not to print out every email or every revision of every document (when only a changed page or two will do), and to proofread final copy twice on the screen before printing it on letterhead. Small expenses can add up quickly.

7. Reduce redundancy.

This analogue of Commandments Number Five and Six will yield the same results as reducing costs: more bang for the buck for your clients and ultimately higher profits for you. Don’t let every associate reinvent the wheel. For example, keep an organized and accessible computer file of forms, research memoranda, motions and briefs instead. You’ll not only increase

efficiency but also help keep your clients happy. (See Commandments Two, Three and Four.)

8. Advertise.

You may think you can’t afford to advertise, but it still takes money to make money. A retailer whose revenues are down will place a big sale ad in the paper, hand out flyers or throw a gala re-opening. Lawyers always want to cut back instead. Determine your target audiences and get your face and name in front of them – whether that means print ads, emails, Twitter or Facebook. And unless your business base is lawyer referrals, be sure to advertise where clients will see it: not in the bar journals, but in trade publications and on business websites. Besides, the Supreme Court a long time ago said that it’s okay.

9. Keep your promises.

The surest way to lose a client, new or long-standing, is not to keep your word. Whether you said you’d call this afternoon, deliver a draft by tomorrow or get together for lunch or golf next week – if you said you’d do it, then do it! If unexpected demands affect your ability to deliver, then let your client know as soon as possible – and in advance – not after the fact.

10. Don’t procrastinate.

Never put off until tomorrow what you can do today. Implement at least one of these 10 rules per day for the next 10 days. Ten years from now may be too late. □

Best Practices



Allison C. Shields
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Allison C. Shields is a lawyer and President of Legal Ease Consulting, Inc., providing practice management and business development coaching and consulting for law firms. She works with lawyers to improve their productivity and systems and helps them to create easy-to-use processes for dealing with the overwhelming workloads and time pressures faced by lawyers.

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Time Management for Lawyers: You Can't Manage Time; Manage Your Activities

By Allison C. Shields

Time is a limited resource; you can't manage time. But you can manage what you DO (and don't do) within the time that you have.

The most common time management tool is the "to do" list, but alone, the "to do" list isn't very effective. Most days, nothing gets crossed off the list, and at the end of the day you wonder what happened. Interruptions, poor planning or lack of priorities contribute to a failure to identify the right activities and perform those activities efficiently.

To identify the right activities, first you must define your core goals and values and ascertain what is most important for the long term benefit of your firm. That is where you should focus your time and energy.

Identifying the right activities isn't always easy. Billable work can easily be mistaken for the highest value work because that's what clients pay you for. But sometimes billable work is less valuable to your firm in the long run than "non-billable" work such as billing (the client can't pay you if you don't bill them), business development (you have to have clients to do work for), or strategic planning (your firm needs to have a clear direction and plan to satisfy clients and ensure steady cash flow).

Know when to hire a professional or pass a task along to an associate or staff member. Consider your preferences and core competencies and those of your

associates and staff. Focus your energy on the tasks that further your core values, are the most profitable and require your personal participation. Play to your strengths and let others play to theirs. You will naturally be more efficient as a result.

In the short run, it may take longer to explain and correct a task or project than it does to just do it yourself. But if the task is one that was properly delegated, the overall return on your time is well worth it.

Ask these questions to aid the decision to delegate:

- Is this the best use of my time?
- Does it need to be done?
- Is it my strength?
- Is it at the core of what I get paid for?
- Does it advance my individual or firm goals and values?
- Does it require my individual participation, personal touch, skills or expertise?
- Can I teach others to do it?
- Is it done repeatedly?
- Do I enjoy doing it? (If so, why? Is there a higher value activity that gives the same payoff?)
- Does it go to the heart of what I do as a lawyer?
- Does it go to the heart of how I bring in business?
- Do I have the requisite expertise to complete this task effectively?

Next, you must prioritize the tasks that remain. Prioritizing determines in advance where the majority of your time and energy should be focused.

Some questions to ask that will help you determine priority are:

- What is the purpose of this task?
- Does that purpose advance my core values and goals?
- Is there an urgent deadline?
- How “old” is this task?
- How high a priority is this task for my firm?
- Is the task as high a priority for my client?
- Can it be done by someone else?
- Is it more or less important than the other things that need to be accomplished?
- How much time do I have available?
- How much energy do I have available?
- How will my firm/practice/clients/employees be affected by this task or its outcome?
- What will it feel like when this is done?
- What will be the result emotionally, productively, financially or organizationally?

Although you need to be responsive and accessible to clients and staff, good management may require particular days or times when you’re “off limits” except for real emergencies. Too often, the focus is placed on the most “urgent” items – the ringing phone, the staff member standing in your doorway or the new

email message, rather than items that bring the most value to the practice or the client relationship. Allowing constant interruptions deteriorates your performance, robs you of much-needed recharging and rest, and is a disservice to clients who are only getting part of your attention.

Once your remaining tasks are prioritized, you need to ensure that you’re working efficiently to manage your activities within the time available.

Give up multi-tasking. Multi-tasking creates extra stress and actually wastes time by distracting you. Focusing on one thing at a time enables you to complete tasks more quickly and productively. (Exceptions include things like reading while on the train, listening to audio while in the car, or doing work while waiting in court).

Divide your schedule into chunks of time for the categories of activities that you must accomplish. For example: strategy and planning; education and administrative activities; business development; client work; and personal/vacation time. Block time for each type of activity on your calendar on a regular basis.

Determine every day which actions or tasks are the most important and make sure those take center stage in your day. Before the day begins, plan what you will accomplish so you can get directly to work. Limit your list to *no more than three major items*. Tackle the most important task first – ask yourself, “If I accomplished just this item today, would I be satisfied with my day?”

Your calendar is your best task management tool. Everything important enough for your “to do” list warrants an appointment on your calendar. Accurately assess the amount of time each activity will require; underestimating will add stress and confusion to your schedule. Determine *when* you will perform that activity and schedule it. Make sure you leave some empty space or “downtime” on your calendar in *addition* to the personal and family time that you schedule.

Build in extra time for the “chaos factor.” It is likely that there will be last minute emergencies, unforeseen circumstances or client crises that must be addressed. As soon as the crisis or emergency has passed, you can return to your schedule without missing a beat. If you must move a task appointment, reschedule it just as you would any other appointment.

Don’t get caught in the deadline trap. Most tasks with built-in deadlines seem to get done, but many important tasks don’t have built-in deadlines. To ensure that those important items get done, create deadlines for them. Use your calendar to reinforce the deadline, and build in accountability by publicizing the deadline to others.

To be more effective, define the highest value activities and focus on those tasks. Create strategies to accomplish those tasks by setting deadlines, minimizing interruptions, delegating effectively and scheduling important tasks. 

Best Practices



Bob Brown
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Bob Brown has tried over 50 cases, including death and serious injury cases, insurance bad faith and insurance coverage. He has also handled multiple appeals in the Texas courts and the Fifth Circuit.

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Let Primerus Help You Navigate Tough Economic Times

By Bob Brown

In these tough economic times, all law firms are taking a deeper look into their marketing efforts as well as their management styles in order to maximize efficiency and profits. Primerus can be an important tool to help your firm survive in the new economy, allowing your firm to market more efficiently and improve firm management.

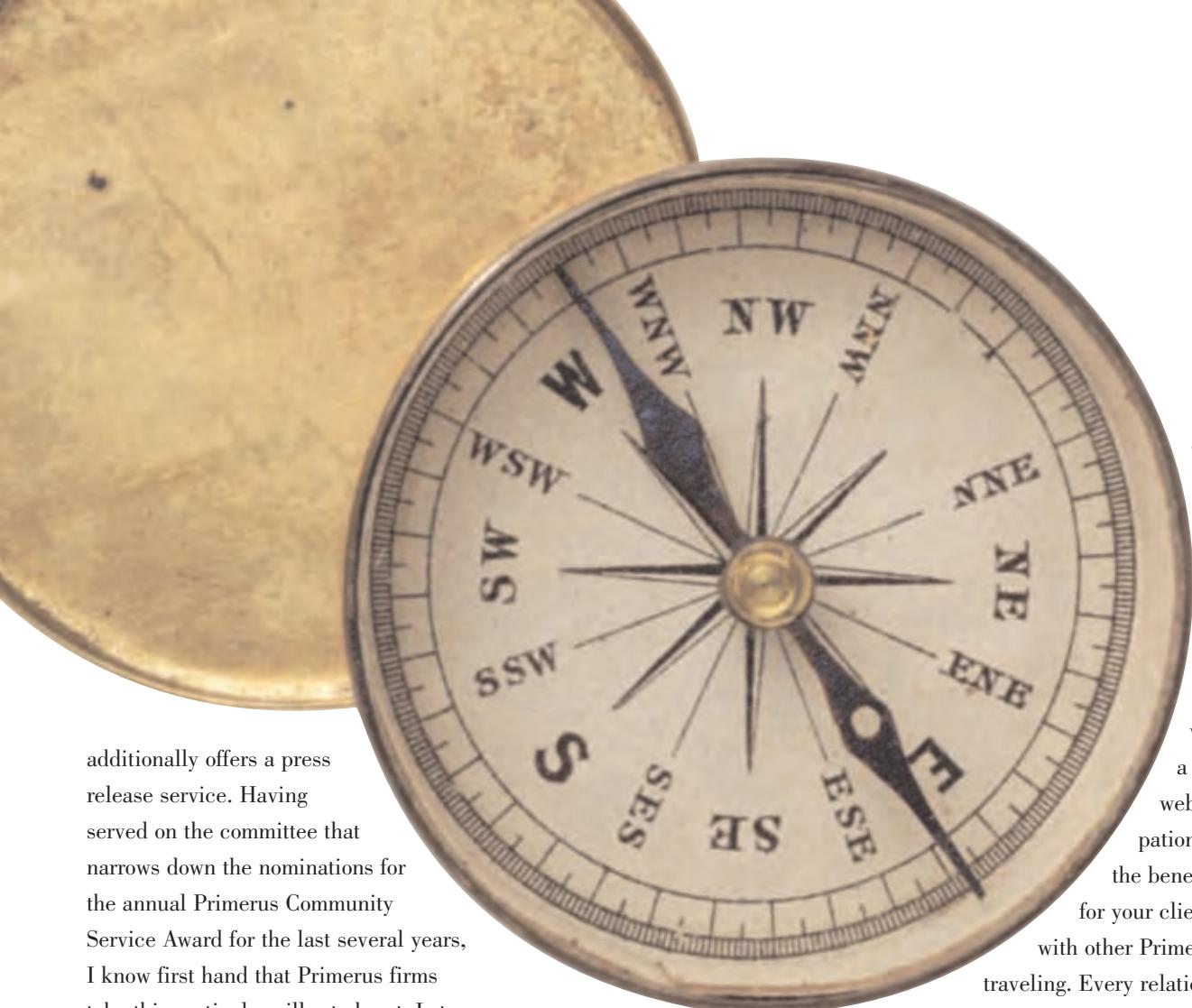
While all Primerus firms are independent entities, in many ways we function as a virtual mega firm with multiple offices. The Primerus Defense Institute now has over 60 firms and 850 lawyers located in 38 states and three countries. No other single firm can give this breadth of coverage around the country. Most importantly, we can afford the coverage of a mega firm, without the costs. All of us are trial lawyers, people who can talk the talk and walk the walk. This is an incredible marketing tool when used effectively.

Not long ago I was at a mediation with clients. It was the typical long affair with plenty of opportunity to talk with them. When the conversation started to wane, I started speaking about Primerus. I have always hated talking about myself, as I was brought up not to boast. Talking about others, and the good things they can do, comes naturally. I asked the clients if there were any venues where they either did not have coverage, or were unsatisfied with their current representation. They identified about ten venues. Primerus had a presence in each and every one of

those venues! I sincerely hope many of you have either received work from this client or will in the near future. I can't tell you how much the clients appreciated the resource available to them and my willingness to take the time to explain it to them. Ten Primerus firms had a good marketing day, without even knowing it was happening. I looked good to the client, as I was supplying them with good lawyers in areas where they were having difficulty. It was a win-win situation for everyone.

What could be a better marketing tool than the Convocation and seminars hosted by Primerus? At what other professional event can you get one-on-one access to great clients in need of legal services? And as I know many clients read this publication, what an opportunity for each of you. How much easier is it to put your trust in a firm when you have personally met the partners and had an opportunity to see them in both a professional and social setting? What a benefit to be able to discuss these firms with other clients that have utilized their services. Every firm can tell you how good they are; what a bonus to hear it from your peers.

On the marketing side, how many firms have employed professionals to increase their website optimization? The cost is enormous! As part of your membership benefits, Primerus continuously works to keep up with optimization trends as search engines evolve. All members also are entitled to two optimized practice area pages. Primerus



additionally offers a press release service. Having served on the committee that narrows down the nominations for the annual Primerus Community Service Award for the last several years, I know first hand that Primerus firms take this particular pillar to heart. Let Primerus publicize your firms' good deeds as part of your marketing plan. This would also include professional honors firm members have received. Primerus also offers customization of professionally developed brochures, broadcast commercials and print ads, all designed to highlight the good works of lawyers across the country.

On the management side, the goal is to save money without sacrificing work product. Many of the marketing tools above will assist firms in maximizing the money spent on marketing, which obviously impacts the bottom line favorably. For more direct savings, Primerus is forming alliances with various industry groups that provide discounts to Primerus firms and their clients. This includes malpractice coverage at reduced rates

with Willis-HRH and Hanover. It also includes R&D Strategic Solutions, a company my firm has used for years for mock trials, focus groups and jury selection. For a complete listing, go to www.primerus.com/affinity_relationships.htm.

We have the best group of small to mid-sized law firms in the country. It is up to all of us to get the word out. The key is to market the network as a whole, not our own individual firms. As Jack Buchanan likes to say, "Self praise is no praise." Try marketing the other Primerus firms to your existing clients. Ask them where they have holes in their coverage. Ask them where the big firms are killing them with their bills. Ask them where their lawyers are not satisfactory. Then solve their problems. Primerus is the solution with great firms, great rates and nationwide coverage.

Put the Primerus logo on your stationary and in your email signature. I am frequently

asked about what it is, and this gives me an opportunity to discuss the great things the network does for my firm. Place the logo on your website, and devote a section of your website to your participation in Primerus and the benefits it provides for your clients. Get together with other Primerus firms when traveling. Every relationship you develop is important. I can't tell you how many great Primerus friends I have made. I can't wait to have an opportunity to collaborate with them on a case. Many terrific clients already use the Primerus network as their de facto panel counsel list. The more the word gets out, the more this will happen. Market Primerus to your clients. Trust that the rest of us are doing the same. If we all live up to this trust, Primerus will grow, the list of Primerus' loyal clients will grow, and all of us will benefit. The firms will see increased business, and the clients will get excellent work product at reasonable prices. Isn't that what Primerus is all about? Helping good lawyers find good clients, and helping good clients find good lawyers. □

Best Practices



Jay R. Downs

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Primerus Referrals 101: Building Relationships with Excellent Service

By Jay R. Downs

I have had several experiences recently which, in my view, illustrate how Primerus member firms can join forces to provide clients with the services they need on a national level.

Our office has had a long-standing relationship with a company that handles liability claims for trucking operations. They have adopted a "blitzkrieg" approach to accident investigation. When they have a significant loss, their designated "go-to guy" gets on the company jet and proceeds immediately to the scene. He summons an accident reconstructionist and a lawyer from that general venue and conducts an investigation that is imbued with the work product and attorney client privileges. He needs legal counsel to provide the privilege, help with local information, assist with investigation and make certain that the work is done in a lawful and ethical fashion. We have learned that when this client calls, the expectation is that one of us drop what he or she is doing and go. The client's philosophy is that, with hard work, 90 percent of what you need to know to evaluate the case can be found within 72 hours of the accident. From there, the company makes a strong effort to get the case settled or identified as a claim that must be denied.

An apex officer of this client attended the 2009 Primerus Defense Institute Convocation in Tucson, Arizona. He was favorably impressed by what he saw and committed to giving Primerus a fair

chance. Within 48 hours of the Convocation, he called me saying that he needed help with an accident investigation in Minneapolis. A few days after that he needed help with an investigation in rural Missouri. Then, a short time later, he needed help with a catastrophic loss in Miami. In each case, I followed the same procedure to get the client what he needed. In each case, the client was very happy and felt that he had received exceptional service from both the Primerus lawyer to whom the referral was made and from me. In every case, the client came away with favorable impressions of Primerus. From my end, these experiences created the feel of having a national firm with multiple offices. I had picked up the phone and called lawyers across the country who were known commodities and helped a client.

Having been asked to think about these experiences and to distill them into lessons from which we can all benefit, I have formulated the following guidelines in making a Primerus referral:

- 1. Make sure you truly understand what the client needs.** For most of us, that is pretty easy. We have had long-standing relationships with our clients and that's why they are calling us. We know their business and want to see them get the help they need.
- 2. Find one or more lawyer candidates for the referral.** It could be a lawyer known from attending Primerus events or it could be a lawyer identified from the

website. It goes without saying that this lawyer must have expertise in the appropriate field.

3. Get the candidate for the referral on the phone. If time is of the essence, be persistent. Tell the lawyer's staff how important it is that he or she be found. In one recent instance, after regular business hours, I found the referral candidate's home phone number through directory assistance and called him there. He was polite, diplomatic and said that he didn't mind the intrusion. His greatest concern was that the client get what he needed.

5. Once the lawyer making the referral and the lawyer receiving the referral agree that the client's needs can be well met if the referral is made, go ahead and make the introduction.

6. Follow up until you know that the client has received the product that he needs.

7. Solicit the client's feedback and ask what could be done to improve next time.

I am pleased to report that when I have followed this process, the results have almost invariably been positive.

that lawyer what initial questions the client is going to ask, and the lawyer and I can gauge whether we think his answers would be satisfactory for this client.

When I look back at this process, it reads like a lot of work, and maybe it is. In each instance, a fair amount of my time was spent trying to make certain that a solid connection was made, that the client was satisfied and, of course, I didn't charge for my time in doing so.

I'm not unhappy about investing my time in this way. In my view, we must build Primerus in the same manner that



4. Educate the referral candidate on who the client is, what he expects and what kind of immediate need he has. Ask the lawyer point blank if he or she is able to provide what the client needs on the client's timetable. Emphasize that if this referral goes well, then all the better for the lawyer receiving the referral, the lawyer making the referral, Primerus as a whole and the client. If it goes badly, then it's a lose/lose/lose/lose result. Everybody suffers.

The Primerus lawyers have dropped what they were doing to provide the service the client needed, and the client was happy. I can think of only one situation in which the client decided not to work with the referral candidate. Even that had a positive end because I was able to find another lawyer who better fit the client's expectations. In addition, that process taught me the initial questions that the client will ask a potential hire. Now when I call a potential for referral I can tell

we build our individual practices – one satisfied client at a time. Organization, structure, letterhead, website, newsletter, professional appearance, publications, industry organizations, etc. are all important. However, first and foremost, we are in a service business. All of those trappings might help persuade the client to give you a try, but good service is what will build a long-standing relationship, build your practice and build Primerus. □

Best Practices



Stephen J. Norton
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Before joining Stewart, Norton was a speechwriter and a spokesman for the U.S. Trade Representative. Prior to that, he covered economic issues before Congress for top publications and served as a legislative aide on Capitol Hill.

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Managing to Get Your Clients Heard in Washington

By Stephen J. Norton

The “change” mantra of President Barack Obama’s campaign is now playing out with great drama and consequence in Washington.

The new administration has been busy dealing with a brush with an economic depression, the collapse of Wall Street, unfathomable budget and trade deficits, the highest unemployment rate in a generation, the expenditure of nearly a trillion dollars to kick start the economy, health care reform and climate change. To be sure, there is a debate in Washington about whether Obama is trying to do too much too quickly, but this much is certain: the old world is gone and the new one has yet to emerge.

What does all of this mean to you and your clients? Are you both on top of these changes? Is it time to start incorporating more of a Washington focus in the management of your firm? In the midst of historic changes in national policy, are you taking advantage of opportunities to influence policies that could affect you and your clients?

As a Washington-based international trade firm, Stewart and Stewart’s perspective on public policy’s impact on clients is rather unique among Primerus firms. We have helped shape policy in the nation’s capital for over 50 years. We have represented clients in matters before both houses of Congress and nearly two dozen executive branch agencies, bringing our expertise and insights on federal laws and regulations right to the people who make and implement them. For example, our

firm has been at the center of the debate on climate change legislation as lawmakers wrestle with the impact such legislation will have on a wide array of industrial sectors. We have also been deeply involved with the lengthy and complex struggle to rewrite the nation’s patent laws. In addition, we have worked closely with government agencies developing highly sophisticated guidelines on the export of potentially sensitive technologies and the negotiation of trade and investment treaties. Stewart and Stewart also worked closely with Congress to ensure federal stimulus spending supports U.S. manufacturers.

Here are a few points to keep in mind as you consider ways to keep up with the rapidly unfolding and profound changes in Washington:

Time is money. Most managers of small and mid-sized businesses – whether manufacturers, service providers, agricultural producers, non-profits or educational institutions – are simply too busy running their affairs to pay close attention to what is going on in Washington. Sure, they likely keep up with the news for the big picture and might rely on a trade association or other professional affiliation to keep them updated on key issues affecting them. However, individual businesses also have unique issues that need to be addressed. More specialized attention can, for example, help a company identify research grant money that might get a great idea off the ground or modify a poorly-written regulation that threatens to hurt a company’s bottom line.



Time is of the essence. The reality is that once a manager has read about a policy development affecting his or her business in a major regional or even national newspaper, or even an industry newsletter, it might be too late to influence the process in a meaningful way. At the earliest stages, the details of a policy that can have an enormous impact on businesses and other groups are often discussed in intimate meetings away from the media. In such meetings, an extra set of eyes and ears early in the process can make all the difference – eyes and ears that are working for you only on the issue.

Strength in numbers. Washington representation helps small and mid-sized firms form alliances with similar firms and work with trade associations to make a bigger impact on policy than any single firm can make on its own. For example, a client might retain a Washington-based firm to monitor developments in Washington that can affect them. If that DC firm is doing its job, it will not only report on developments affecting the client, but also identify and facilitate ways to mount a common effort when needed.

It is your government. Lobbying has a bad name these days, in part because it has become so intrinsically linked to the influence of money. But it is important to remember that the Constitution guarantees the right to petition the government – not only for the well-heeled but also for the small and mid-sized businesses, non-profits and average people. Often, policy makers simply need better information to make better policy decisions. Your client company may have that information – the key to success is getting it to the right decision-makers at the right time.

Alternative ways to stay on top of developments in Washington DC. To be sure, having professional representation in Washington will not be an option for all firms. Letting your member of Congress know your concerns through the district office remains an effective way of putting your views front and center. In addition, the good news is that there are more ways than ever to monitor developments that could affect you and clients – for free. For example, the Congressional Record, which has complete transcripts of the House and Senate debates, is online within 24 hours at the Government Printing Office (GPO)

website (www.gpoaccess.gov/crecord). The Federal Register invites comments on each step of the process of writing the regulations and implementing the laws Congress passes. It is also available at the GPO site. The Library of Congress's Thomas (www.thomas.loc.gov) is the portal to everything going on in Congress. It includes links to committees with jurisdiction on matters of concern to you and your clients. In addition, trade associations will gladly respond to the active involvement and inquiries of their members, so make the most of these ties. These resources might help you to keep track of changes in Washington and assess what your needs are for monitoring developments and getting heard in Washington. However, there is no substitute for having your own advocate on the ground in DC to project your viewpoint on public policy into the national debate.

Making a real impact in Washington requires more hard work, experience and policy expertise than many might believe based on the popular images of glittery influence and power plays. The reality is more mundane, but just as consequential. Knowing the intricacies of how to get a provision in a spending bill, connecting the dots in personal relationships, or having a feel for how to navigate the complex bureaucracy of a large federal agency can make all the difference to clients. No matter how much else may be changing in Washington these days, that much will not change. □

Best Practices



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For the Sustainable Firm, Why Young Lawyers Should Be Heard and Not Just Seen

By Robert W. Bivins

Two of the key challenges facing even the most successful law firms are how to retain the firm's best and brightest young attorneys and to how to assimilate them over time into firm management. It is the rare lawyer indeed who remains with the same law firm throughout his working career. Yet firm managers are constantly taken by surprise when these departures occur. The impact of losing a talented lawyer can prove extremely disruptive. Not only can it result in internal disruption to the firm culture and management and loss of economic productivity, but the departure of a more seasoned attorney with client relationship responsibilities can also result in a significant loss of existing clients. As a result, long-term lawyer retention and assimilation must be focuses of every successful firm that desires to grow and survive for more than the practicing life of its founders.

During my years of practice, I personally have had the privilege to participate at a management level in three very different law firm cultures. None of these firms were large, but each adopted a very unique style of dealing with their younger attorneys and assimilating them into firm management. They also experienced differing degrees of success. The balance of this article briefly addresses how these firms dealt with young lawyers, some of the challenges presented under each style and their level of success.

Case Study One: The Founding Fathers

The first firm I worked for after law school was a relatively new firm that had been formed and managed by truly some of the best lawyers I have met to this day. They also were fine businessmen in their own right. The firm was relatively young when I came on board, but was well known and well respected in the market based on the reputation of its founding partners. However, the challenge for the firm came as the first round of new hires came up the ranks and wanted a role in management. While there was plenty of responsibility to be passed down to the junior partners, the founding partners were hesitant to hand over real decision-making authority and instead reserved that power within their senior group. This resulted in increasing friction as the junior partners pressed with increasing aggressiveness for real management authority and the senior partners found themselves pushing back.

The result of this tension was the eventual departure of most of the junior partner ranks and genuine concern about the survival of the firm. However, it also led to introspection and firm-wide discussions about the future. This led to an eventual reassessment of how to incorporate junior partners into management. Over time, the firm responded by altering its management approach to create both management and compensation boards, each of which incorporated younger partners working in concert with more senior attorneys. They also began a tradition of firm weekly "happy hours," where all levels of

attorneys came together in an informal setting as equals to both get to know each other on a more personal level and discuss matters of general interest to the firm. Ultimately, this process not only made younger attorneys feel more vested in the firm and be privy to the senior attorneys' reasoning processes, but also allowed the senior attorneys to gain confidence in the younger ranks as they watched them mature within the firm structure. Today, by all reports the firm is stable and successful and the major issues of generational succession have to a large degree been overcome.

Case Study Two: The Strong Man

Like so many of my contemporaries I decided after a number of years in one place that it was necessary to see if indeed the grass was greener on the other side and eventually migrated from my first firm. Upon making the move, however, I found a new firm management style that could not have been more different from my prior experience. The new firm was run absolutely by a strong managing partner. There were few firm meetings for gathering consensus, seeking attorney input, or otherwise taking the firm's temperature. In fact, there was little consultation with the other partners before the managing partner made key decisions and there was little effort to build consensus among the firm's attorneys. Instead, the managing partner kept all management close to the vest, generally rewarding those who supported him and freezing out of the

decision-making process those who did not. Even more significantly, there was no meaningful effort made to blend younger attorneys into the firm, much less train them in firm management. Instead, the firm mantra was that associates should be seen and not heard. As with most such models, it ultimately proved unsustainable and eventually collapsed under its own weight. Most associates and partners who were on the outside of management looking in became frustrated and eventually left the firm.

Anyone who has read about the "benevolent dictator" model of management knows that under the right circumstances the model can thrive, at least as a transitional phase of firm development. However, a dictator who lacks benevolence is a dangerous thing indeed. Even a strong manager needs to constantly ensure that he is communicating and gaining "buy in" from the other partners, as well as making associates feel important to the firm and relevant to its future. No managing partner is an island and the need to evolve and develop one or more successors to eventually take their place cannot be ignored. Otherwise, the destiny of the firm can only be to fail. The potential for loss of seasoned attorneys and the corresponding loss of clients as relationship managers depart can be crippling.

Case Study Three: Executive Committee

In developing a model of firm management for my current firm, my partner and I were concerned about making sure we incorporated the best elements of our prior law

firm experiences while avoiding what we felt were the missteps of those firms. Accordingly, as a small firm we elected a managing partner model rather than the democracy or managing committee models. But we have adopted a firm policy of discussing all significant firm management issues and decisions among the partners and striving to build a general consensus before proceeding with any strategic decision, regardless of whether a measure might pass without such a consensus. We make a point of involving all attorneys, regardless of their seniority, in discussions that will impact them, their practice area, or the overall firm's management. We keep our attorneys informed and consulted on strategic firm decisions, as well as involved in the firm's annual planning meetings. We attempt to incorporate frequent attorney social interaction into our model and encourage (morally and financially) even young attorneys to represent our firm in the community, all the while letting them know they have an important role to play in the future of the firm and in real time business development. Essentially, we have tried to incorporate into our firm psyche the idea that each attorney's role in the long-term future of the firm is important and that no one is treated as fungible so long as they actively contribute to the firm's well being.

Each firm's personality is unique. As a managing partner, however, I would suggest that incorporating into any firm model mechanisms and policies that make all attorneys feel a part of the firm team and its destiny is a critical element of firm success. □

Best Practices



Kevin M. Norchi
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Attracting Quality Associates to the Small or Mid-Sized Law Firm

By Kevin M. Norchi

If you are fortunate to be an attorney in a small to mid-sized law firm, you are acutely aware of the professional benefits including close relationships with clients, the opportunity to be tested early and often on your own merits, the requirement to maintain and increase areas of expertise, and the necessity of developing entrepreneurial skills. Of course, these same benefits are often seen as ordeals to be avoided by many other attorneys. The challenge for small firms which represent significant clients in complex matters is to attract, and then retain, high-quality associates who will be successful and able to meet the firm's and the clients' needs and expectations.

In difficult economic times, as now, profit margins decrease, expenses inflate and the attorneys in small firms are much closer to the bottom line. Small firms can be more susceptible to economic changes – both good and bad. But these changes can be an opportunity for quality growth of/in the small firm. Historically, most law firms attempted to weather these storms without layoffs. It is different today where large law firms are shedding staff, associates and even partners in order to remain afloat. Small law firms have much in common with small family businesses where extreme measures are often taken in order to avoid layoffs. Today, economically viable and successful firms have an unusual opportunity to attract high quality lawyers who are looking for stability and opportunity.

Small law firms attract interest from lawyers searching for employment from a number of different sources. Our firm, Norchi, Barrett & Forbes, is a defense litigation and trial firm. We attract interest from quality associates who are aware of the clients we represent. Like many firms, regardless of size, our firm is a reflection of the company we keep. We are known for representing a number of significant and sophisticated institutions in Ohio in complex civil matters. As a result, we are involved in litigation with counsel from larger law firms. Our small firm compares well because our attorneys are experienced, professional and competent. Technological advances level the playing field and permit the small firm to handle tens of thousands of documents, hundreds of depositions and provide excellent responsive communication with clients. Lawyers from other firms note this. Competency and integrity are significant factors in attracting associates to the small firm.

Small firms are able to attract quality associates who are looking for opportunities they might not have in the near term at a larger firm. The regimented layering of attorneys at traditional firms may serve a purpose of developing young lawyers and providing continuity for some clients over long periods of time. However, this system may become onerous and even suffocating to skilled lawyers with entrepreneurial interests. To address the needs of associates who quickly develop strong legal skills, our firm provides the services of a consultant to assist lawyers in

identifying areas of expertise and continuing to evolve with clients. This creates opportunities for associates who then have to take the lead and work closely with clients. Although the strengths and weaknesses of attorneys are quickly revealed in a small firm, attorneys develop an understanding of what they want to achieve as lawyers. Thus, quality associates are attracted by the opportunity to grow and develop. But they should also be aware that the same opportunity may reveal, at a stage earlier than the traditional route, their true calling. Ultimately, the reputation of the firm and its efforts in educating and developing lawyers are factors in attracting quality associates.

One of the significant strengths of any law firm is its personnel. The attorneys that make up the law firm create a personality that is perceived by clients, colleagues and judges. The senior attorneys are very important in attracting other talented attorneys. This can be accomplished through professional activities. Participation in local bar association events and committees are important and send the message that the firm is interested in the health and well-being of the legal community. Other firm personnel are also important in this process. Paralegals involved in cases often come in contact with lawyers from other firms. Professionalism is important in all parts of the firm. Secretaries, receptionists and consultants also come into contact with attorneys and clients alike and leave



impressions of the firm. They should all be considerate and professional.

An article of this nature would probably be more aptly written by attorneys we have hired in the past. But from my perspective, quality associates do their homework before they contact us. We are a litigation and trial law firm. Typically, the first contact that I have from an attorney seeking employment is based upon our reputation with other lawyers and judges. The principles that we adhere to – which are valued by our clients – are recognized by other attorneys. We also make reasonable efforts to accommodate unique family situations, while still maintaining high quality service to our

clients. Permitting lawyers to develop and maintain well-balanced lives – although often difficult – attracts quality associates.

As we look to expand some practice areas, we note that many good lawyers are looking for enhanced opportunities to evolve, to develop client relationships and to succeed. We attempt to make them aware of our firm through our work on behalf of clients, our participation in professional activities, discussions with other attorneys and participation in our communities. Success can be elusive, but when done properly, attracting and hiring a quality associate to become part of the firm can be very rewarding. □

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The Billable Time Role Vs. The Management Role

By Keith Hearn

In this article I want to look at the perceived conflict between the service delivery role of the partner – the billable time role – and that other function which gets in the way – the management role.

Many of you might have heard the plea, “But I do not have time for all this management stuff,” usually if the conversation is centered upon something like cash lock up, or complaints, or lack of billing and so on.

I don't want to do it ... but I don't want anyone else to do it instead of me!

Most studies show that lawyers want their autonomy. They are typically type-A personalities – driven by goals and deadlines, motivated by success, constantly craving reassurance, insecure. It is full of contradictions when you get down to it, but it is what makes us lawyers.

How about that partner always late to partner meetings, or who can never make them, or sits there BlackBerrying oblivious of what is going on – are you left with the feeling that they feel their work is much more important than all this management? Try saying, “Look, we can see you don't like these meetings. We have decided that you should not attend any more.” Will the answer be “Oh, joy, thank you?” No. It will much more likely be, “Ah, so you're trying to get rid of me, eh? Trying to block me out...”

Is a lawyer a worker, a professional or a manager?

Look with envy at your client managers who do just that – manage – and nothing else. They do not have to stand at a machine and make the nuts and bolts they sell, but you have to sit at your desk and draft that pleading, or that agreement, or sweat it out in court, and do the night time reading which goes with it. Many readers will be worker-producer, capital investing, entrepreneurial, stake holding, learned, manager professionals. How do we balance these and prioritize so many roles?

Am I supposed to bill hours or manage?

My case is that too often partners are much too interested in managing the wrong things, and that the apparent conflict between being a lawyer and a manager is self-created or encouraged. Ask yourselves how many partners' meetings you have seen where the partners deal with difficult things almost pro forma and then get really carried away by matters of no great moment. It can be easier to get agreement on matters of great moment than on trivia. Only later does the fun set in of getting partners to do that which they agreed to do.

Space does not permit the discussion of the multiplicity of reasons why people agree to things they do not really agree with and are not committed to doing. However, I suspect that law firms expend quite vast management time and effort trying to get people to do that which they

have already agreed to do. I venture to suggest it is one of the biggest management time wasters of all. So here are some rules which we try to live by and which try to clarify the role of a partner whose preference is lawyering and not managing. As we will see, though, it is not a management-free zone.

The Rules:

1. Doubt is fine. If the decision is important enough, anyone can have doubts as they work through their decision-making process. It is legitimate to express fears and concerns, and this should be encouraged.

2. Agreement is sacrosanct. Doubt is part of the decision-making process. Once the decision is made, doubt is irrelevant. I might have come to a decision 51:49 but I implement it 100 percent. No partner should be permitted the luxury of agreeing to an action and then seeking to water it down or talk it out after the decision is made.

3. Delegation is mandatory.

Partnership does not require that every partner gets involved in every executive function, even if every partner is involved in the strategic decision. Partners must be prepared to delegate downwards, upwards and horizontally. They must learn to allow others to discharge functions. Wanting to be involved in everything is not a workable principle. The only rule is the best person for the job should implement the strategic direction agreed

by the partnership, or its Board of Management if so delegated.

4. Accountability: Any partner charged with the execution of an executive function must account and report on the discharge of that function. Establish a regime where partners can be removed from those roles if they do not fulfil them – it is better than allowing resentment to build such that the demand is for their removal from the partnership.

5. Complimenting rights with duties: Any partner taking on a function must not treat that as a privilege but as a duty. The firm must not permit anyone to take on a job for status or other reasons which are not linked to manifest clarity that the duty will be discharged. If there is a right to make a decision, then there is a duty to actually make decisions in the interests of the group.

6. Resolve conflict between management and service delivery: Many partners see their personal service delivery role as their “job,” and pretty much anything else “interferes” with their job. I have even heard that argued for billing. There is a flat “no” to such a proposition. There is a level at which it must be recognized that management is an integral part of the role. If the lawyer wishes to preserve their autonomy in the client relationship, then that is an autonomy which only exists in taking full account of the interests of other partners and employees.

7. Limited professional autonomy:

For instance, a senior lawyer who does not find time to properly supervise the cases

of junior lawyers is not acting as a responsible lawyer. Taking care of the people who deliver service to your clients is an essential part of the role, not an optional extra. Note any correlation between the senior who always reckons they find it quicker to do it themselves and the absence of associate development and numbers.

8. Service delivery is management uptime. Case supervision, case planning, feedback to the junior as the case proceeds, and guidance as we go are vital to ensuring that the client gets good service. In doing so we deliver training to that junior lawyer in up time and not down time and improved service. If you believe in winning work by recommendation, then you are marketing in up time, not down time.

Why do I say uptime and not down time? Because added value supervision is just that and is there to be paid for. Management of service delivery up front is not down time. Clearing up a mess because of a failure of supervision definitely is.

Experiences will differ, but we believe there is a direct correlation between business expansion and the management of service delivery. Where service delivery – the art of the lawyer – is well managed, management problems are reduced both in volume and kind. More service delivery management equals less management of the unpleasant and the fractious. Success has a habit of taking care of itself once you take care. □

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Growing a Law Firm That Stays Together

By Joel W. Collins, Jr.

Since Collins & Lacy, P.C. joined the International Society of Primerus Law Firms in 1996, we have more than doubled in size. We have had several lawyers join us and then leave, but these were all individual and unique situations. None of them had to do with the sort of dissatisfaction which can destroy a law firm. Those of us at the firm who have chosen to practice law together are a group of men and women who respect, admire and enjoy one another. These are some of the lessons I have learned and opinions I have formed during my 41 years in the legal profession about how to grow a law firm that stays together:

1. **There must be a bedrock of integrity in everything you do.** Simply put, law partners, associates, paralegals, secretaries, administrative employees, law clerks, office clerks and everyone else in a law firm will reach their own conclusions about whether those who manage the firm are honest and reasonable. If they see deceitful, hypocritical, unfair or unreasonable policies and practices, they will not have confidence in the firm or its leaders. This will undermine commitment to stay. Because the most capable people in the firm can most easily leave and find other positions, the consequences of such perceptions can be devastating. If the



people of a law firm see honest dedication and leadership by example, as is constantly provided by our firm's President, Gray Culbreath, they respond positively. If you want yours to be a stable and growing law firm, start with and never lose sight of the important first pillar of Primerus, integrity.

2. Law firms need to hire and keep good people. Those people have to be friendly, likeable and magnanimous. We obviously want capable, brilliant and diligent employees, but those qualities alone will not contribute to the harmonious working relationships needed for long-term success in our stressful profession. Our law firm is blessed to have as our Firm Administrator, Bruce Beatty, a man who has grounded us in conservative, well-considered systems and practices. He has helped us hire and keep the best job applicants who come our way.

3. Everybody working in a law firm needs feedback. My great friend, Gordon Fearing, a human resources consultant, told me of a conversation he had with a lady working in a firm which had hired him as a consultant. When he asked her how long she had been working there, she responded, "Ever since they threatened to fire me." We do not issue such threats, but we do like to give our employees feedback on how they are doing. The overwhelming majority of this feedback is positive reinforcement. As a general in the Army once told me, "There are only eighteen inches difference between a pat on the back and a kick in the rear, but you will get more results from that pat on the back."

Look for opportunities to pay sincere compliments to others in the firm.

4. Constantly re-evaluate compensation schemes and pay scales because the equities change quickly. Assiduous and capable lawyers who leave one firm to start or join another most often make their decision based on perceived inequities. When lawyers feel there is rigid and inflexible thinking at the top, especially about compensation, when they conclude that their contributions are not sufficiently appreciated, they tend to start looking for other opportunities. The same is true for the best employees of the support staff. My advice is to consider the equities of the law firm as best you can from their point of view. If you want your law firm to succeed and grow, especially in these highly competitive times, you need to keep your best people. They are the ones who build and maintain your reputation.

5. Avoid financial debt as much as possible. We all need to live within our means. When law firms borrow heavily to finance equipment, furniture, fixtures or even, God forbid, year-end bonuses, they create problems and burdens which disproportionately land on the younger lawyers. Lawyers with hefty home mortgages who support growing families do not need to have more financial stress by being required to personally guarantee and help service loans of their law firm. Firm debt can even cause associates to decline partnership offers. We have all read of well-established law firms closing their doors. In many instances, a contributing factor was excessive firm debt.



6. Create practice opportunities for these young lawyers. When the right opportunity presents itself, put them in the court room. Do not shield these young lawyers from contact with clients. Invest in the skills and expertise of these younger lawyers and staff members by encouraging them to participate in professional organizations and to seek leadership positions within those organizations. These younger lawyers should be given opportunities to attend the best CLE programs presented by nationally prominent organizations such as the American Bar Association, DRI, American Trial Lawyers Association and, of course, Primerus. The same senior lawyers cannot hog the opportunities to attend conventions, conferences and convocations. Younger lawyers need to be allowed and encouraged to attend these and also to make site visits to the offices of clients. Any effort to isolate younger lawyers from clients can breed resentment and discontent.

7. While small, thoughtful and personal touches come naturally to some people, they are learned skills by others. If necessary, lawyers need to learn how to say, "Good morning," "How was your weekend?" "Thank you for your hard work today," and "Thank you for staying late to help get the work done." These thoughtful remarks create a buffer of good will.

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8. Firm retreats, regular firm meetings, team meetings or practice group meetings play a role in the healthy life of a law firm. A firm retreat is not held for the benefit of the senior-most lawyers. Rather, it is an opportunity for the youngest and newest lawyer to feel they are a part of the firm's goals and plans. A weekly meeting, provides opportunities for professional collaboration and for building esprit de corps. In our firm we share news about each other's practice. We encourage lawyers to come prepared to discuss a case they are handling. We share ideas about the pleadings, expert witnesses, settlement values and other aspects of a litigation practice. A younger lawyer gains credibility when he or she advises there was a discussion of the client's case and consensus opinion about the advice which is being given. Included in the mix of meetings should be

a social event, at least annually, where all employees of the firm are invited to attend with their spouses or significant others and with children and/or grandchildren.

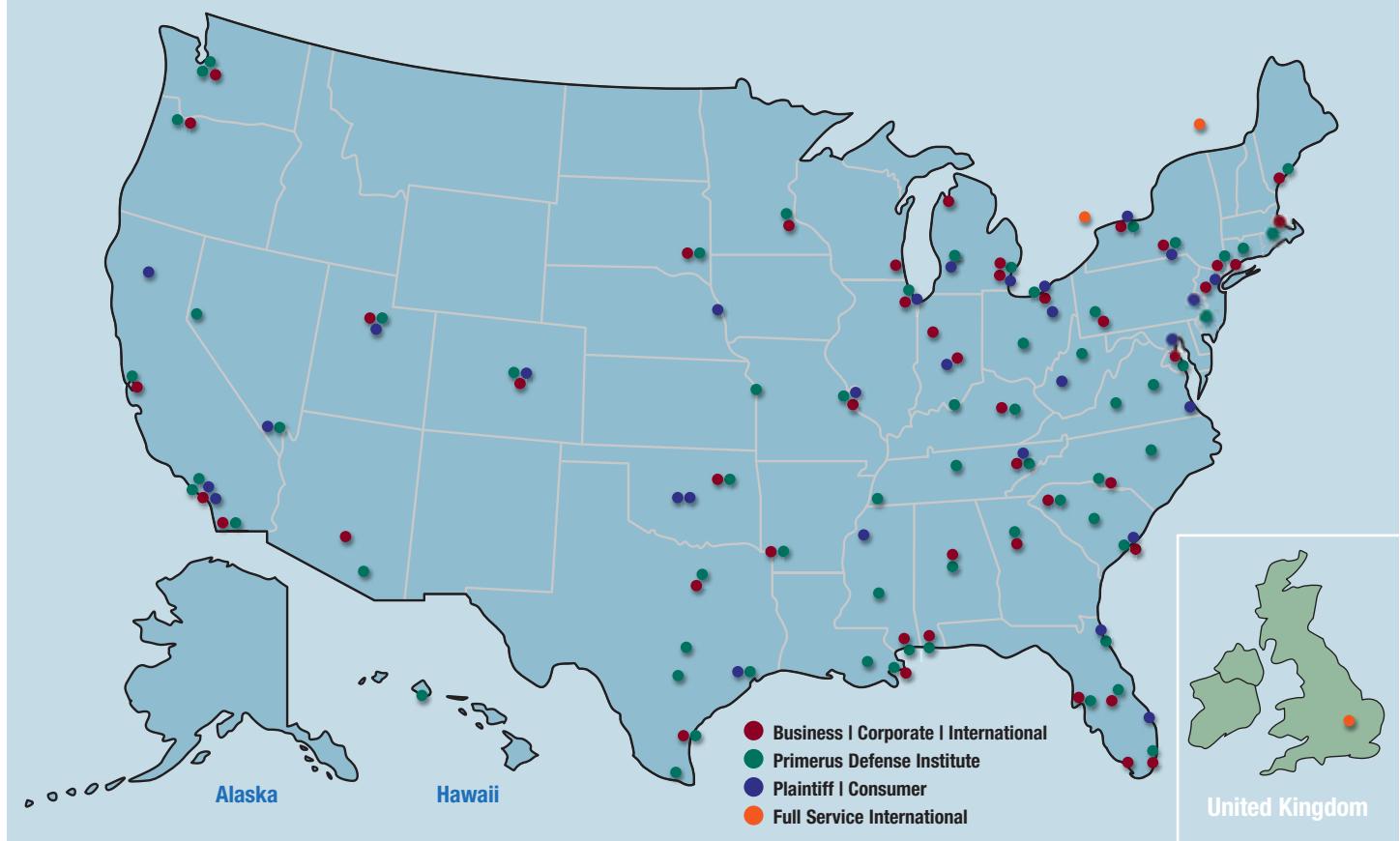
9. A well-designed and funded 401(k) program, along with other benefits, such as health insurance, contribute to a sense of security and well being among everyone working at a law firm. It is not enough, however, to simply have these programs. Employees need to be educated about their advantages and how they work. Representatives of those programs are usually glad to come for a meeting where those benefits are explained. Remember, as new employees come to the firm, these educational programs need to be repeated.

10. A good intra-firm training program makes sense for a lot of reasons, including the cohesive effect such programs have on the satisfaction these employees have working at the firm. We tend to have these every other Wednesday as

a "Lunch and Learn" program. Everyone contributes as a presenter from time to time. Lawyers who come back from a seminar are asked to share what they learned with those who attend. We video tape our Lunch and Learn programs for the benefit of those who cannot attend and those who join us in the future.

Firms that grow, prosper and stay together do not do so by accident. It is satisfying and rewarding when it does happen. Being generous with your partners and others with whom you work helps a firm stay together. Also, it is the right thing to do. As my 99-year-old mother reminds me, "There are no luggage racks on those hearses." □

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2010 Calendar of Events

January 12, 2010 - BCI Winter Conference

The Aria Resort
Las Vegas, Nevada

The 2010 Business/Corporate/International (BCI) Practice Group Winter Conference will be held in conjunction with the 2010 Alliance of Merger & Acquisitions Advisors (AM&AA) Winter Conference.

January 12-14, 2010 - AM&AA Winter Conference

The Aria Resort
Las Vegas, Nevada

Primerus will exhibit at the Alliance of Merger & Acquisition Advisors (AM&AA) Winter Conference, held in conjunction with the 2010 BCI Practice Group Winter Conference.

January 14-15, 2010 - PDI Transportation Seminar

The Aria Resort
Las Vegas, Nevada

The Primerus Defense Institute (PDI) will be holding its second annual Transportation Seminar.

February 25-28, 2010 - PC Winter Conference

The Westin Key West
Key West, Florida

The Plaintiff Consumer (PC) Practice Group will hold its annual meeting in Key West, Florida, with Eric Oliver, MetaSystems Inc., as the keynote speaker. Eric is a nationally renowned speaker who regularly presents at American Association for Justice (AAJ) events.

April 22-25, 2010 - PDI Convocation

The Boulders Resort
Scottsdale, Arizona

The Primerus Defense Institute (PDI) will hold its annual Convocation at The Boulders Resort in Scottsdale, Arizona.

October 14-16, 2010 – Primerus Annual Conference

Villagio Inn & Spa
Yountville, California

The Primerus Annual Conference provides members the opportunity to create new friendships, network with peers and learn valuable practice management tools. Please plan now to join us.

Business | Corporate | International

Susan Schultz Laluk
BCI Practice Group Chair



Managing a law firm has often been compared to “herding cats.” Most managing partners would likely agree. Attorneys by nature tend to be independent and strong-willed, and resist being told what to do or how to conform. But in these challenging economic times, the difference between a successful law firm and a defunct one is often the effectiveness of its management.

One of the Six Pillars of Primerus is “excellent work product,” so lawyers in Primerus law firms are by definition excellent attorneys. However, the talents that make us excellent attorneys are not the same skills required of an excellent manager, and few of us receive any training in management in law school or otherwise. Although some firms have turned to professional non-attorney managers, for small to mid-sized firms like Primerus law firms, this is not always a reasonable option.

The structure of management at law firms also varies. Traditionally, many firms have been managed by partnership consensus, but this kind of democratic structure can become unwieldy as a firm grows, and even in a smaller firm may not provide the nimbleness required by today’s economic climate. The task of management is more often centralized with a managing partner or management committee, who are delegated varying degrees of authority.

What kind of person makes a good managing partner or management committee member? At many firms, the management role falls by default to a founding partner or a significant rainmaker or whoever objects least to having to do it. However, the strongest management teams will embody vision and good judgment, the ability to make and implement strategies consistent with the firm’s vision, and the leadership to garner the respect and support of the remaining partners.

More and more firms are taking advantage of professional leadership training and executive coaching to support their current management team and groom future firm leaders. Individuals who have an aptitude and willingness to manage are identified, and the firm hires a professional to provide leadership training and coaching. Although not inexpensive, the failure to properly support and develop current and future management can be very costly.

Finally, the non-managing partners must be willing to cede some measure of their independence to be collaborative and supportive of management. The “cats” need to allow themselves to be herded!

I would strongly encourage everyone to “join the herd” of Primerus attorneys headed to The Greenbrier in West Virginia for this year’s Annual Conference, October 22-24. We have a very exciting program planned, including presentations by Bob Weiss on getting paying work from marketing activities, the lessons to be learned from a recent national marketing

effectiveness survey and social media marketing (tweet lately?).

In addition, the BCI Practice Group will be discussing how we can more effectively collaborate with other Primerus firms to handle large client matters. We will have a session allowing Primerus members to inform us regarding unique practice areas that can service other Primerus firms and their clients. We will also be updating our members regarding our latest initiatives, including our conflicts counsel initiative, and the planning of a client networking event.

The Annual Conference promises to be both informative and fun, with plenty of opportunities to establish and renew valuable connections with fellow Primerus attorneys. I always leave with renewed enthusiasm for the practice of law. Hope to see you there!

Sue Laluk

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Primerus Defense Institute

Hugh McCabe

PDI Chair

There are many reasons law firms should focus on creating an atmosphere that facilitates attorneys working together over a long period of time. Working to minimize turnover will not only help your firm in the long run, it will also go a long way in cementing client relationships.

Establish a Firm Culture: Who are you? Law firms need to create a personality. Judges and lawyers from the community should know your firm's reputation. When partners get along, and associates want to stay, you are on the right track to achieving stable longevity as a firm.

Keeping It Together: For many firms, creating a culture is simply not enough. Oftentimes firms engage in activities that foster the development of associates and staff and make people feel "we are all in this together." One method of accomplishing this is to have periodic meetings with all attorneys in the firm and/or smaller team meetings including support staff. Outside social activities can also contribute to keeping attorneys and staff together. The development of both professional and personal relationships can go a long way in making people happy to come to work.

Associate Hiring/Retention: Many firms are pressed for time and don't spend enough quality time on the hiring process. This is a big mistake. When hiring associates, you need to spend time not only evaluating the ability of the associate but

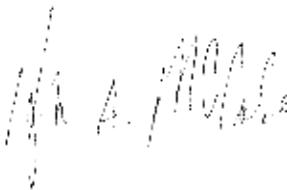
also their personality. Is this the type of person who will fit into the "firm culture?" Is this the type of person you could potentially see as a partner sometime down the road? Can this person be a "salesman" and help market our firm?

Retaining associates has historically been a difficult task for many firms. Despite impressions to the contrary, many studies show lawyers are inclined to accept less pay if they enjoy coming to work everyday. New associates need to be mentored and given opportunities to grow. Simply giving associates "assignments" will not facilitate this process. Law firms should strive to give associates as much responsibility as possible. This gives associates a quicker view of the "big picture," which contributes to making them a better attorney. Evaluating associates on an annual basis and letting them know where they stand is also key to their happiness and yours. Trying to get them into trial (second chair or otherwise) can also go a long way in keeping associates happy. Law firms need to create an environment where associates want to put down their roots and hope someday to become a partner.

Marketing: All partners and associates should be required to be involved in some form of marketing. Recognize that the type of work an associate may bring in is different from that of a partner. Be open to developing other areas of practice. Individual marketing plans should be

created setting out expectations. Firms should strive to provide the tools and ideas to maximize the success of each attorney. When associates bring in business, the firm wins too.

Creating a firm culture and retaining associates can be difficult but is often crucial to your success. This is my first column as Chair of the PDI. I look forward to serving in this capacity and to helping contribute to your experience with Primerus. I hope you can join me at the PDI Transportation Seminar January 14-15, 2010, at The Aria Resort in Las Vegas. Please also plan to attend the PDI Convocation April 22-25, 2010, at The Boulders Resort in Scottsdale, Arizona. I look forward to seeing you there!



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Plaintiff | Consumer

Edward Ricci

PC Practice Group Chair



There is little doubt that the economic problems in our country today are the worst in decades. Some historians already are characterizing this period as “The Great Recession.” I have been practicing as a consumer trial attorney in South Florida for over 35 years. Ever since the early 80s, I have been hearing the pundits shout “the sky is falling, the sky is falling!” if trial attorneys and the tort system are not reeled in. Rarely did a month go by that someone in Washington did not warn of the collapse of our economy because of “frivolous lawsuits” and million dollar jury verdicts.

It is interesting to note, however, that in the greatest economic collapse in the last 75 years, no one has attributed a single cause to the tort system or to trial

lawyers. Pursuing claims for consumers is about justice. It requires experience and courage. It’s about facing long odds and prevailing. It’s about doing what is right. Justice is about opposing those whose errors or negligence harm the innocent.

Safety and justice are every consumer’s right and our job is to steer our efforts on behalf of our clients, now more than ever. Ben Franklin phrased it well when he said, “We must hang together... or else, we shall most assuredly hang separately.”

Primerus was created to uphold the ideals of our profession by seeking only the very best attorneys and law firms for membership. Equally important, Primerus members collaborate to identify strategies for success in an increasingly challenging marketplace for small and medium-sized firms. The Primerus Plaintiff Consumer

practice group has been described by members as a “place where I belong.” It is most certainly where excellent, like-minded attorneys come together to meet the challenges of managing their practices and providing justice for our clients.

I hope to see each of you at the upcoming Plaintiff Consumer Winter Conference, scheduled February 25-28, 2010, in Key West, Florida. Eric Oliver of MetaSystems Inc. will be our keynote speaker and facilitate a lively case evaluation discussion. Eric is a nationally renowned speaker who regularly presents at the American Association for Justice.

A handwritten signature in black ink that reads "Edward Ricci".

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“Our firm is about to celebrate its 80th anniversary,
and the firm has always been located in Essex County.
So we have very deep roots within the community.”

For 40 years Mandelbaum Salsburg has supported the Mental Health Association of Essex County, Inc.

For 40 years, attorneys from Primerus member firm Mandelbaum Salsburg have supported the Mental Health Association of Essex County, Inc. (MHAEC) located in Montclair, New Jersey.

Currently, Craig Alexander, a member of the firm, serves on its Board of Directors and has been appointed Vice President for the 2009-2010 term.



Members of Mandelbaum Salsburg law firm gather with dignitaries at the Mental Health Association of Essex County, Inc. gala. From left are Richard Salsburg, State Senator Richard J. Codey, Barry Mandelbaum, Essex County Sheriff Armando Fontoura and MHA Executive Director Robert Davidson.

“Our firm is about to celebrate its 80th anniversary, and the firm has always been located in Essex County. So we have very deep roots within the community,” Alexander said. “This organization provides services to the mentally ill and their

families within Essex County, so it’s a natural fit to help people within our community.”

The firm was honored for its long-standing service to the MHAEC at its annual gala on May 27, which raised \$120,000 for the organization. The MHAEC was founded in 1950 and provides a broad range of services for individuals and their families living with mental illness. The group also serves as an

At Mandelbaum Salsburg, attorneys are encouraged to pursue pro bono and community service work based on their personal passions. “Our firm culture is that you should enjoy your work and you should enjoy your charitable activities,” Alexander said. “So we have said pick something that you believe in and we will support you.”

As a result, the firm has attorneys making an impact in many different areas, including cancer support groups, religious organizations, local school boards, the American Red Cross and the YMCA.

Last April, more than 30 firm employees and their friends and family members participated in the Susan G. Komen Race for the Cure, raising approximately \$2,000. The Mandelbaum Salsburg team, along with over 10,000 community participants, ran or walked 3.1 miles to support the cause. Mandelbaum Salsburg is a Primerus business law firm located in West Orange, New Jersey. □

advocate for the mental health community, promoting legislation, seeking funding and advancing the cause of improved care and treatment for mental illness.

Alexander finds it rewarding to meet the families who receive services from the MHAEC. “You see how it helps and makes a difference in their lives,” he said.