December 2012
&
January 2013

TLOMA Today

A publication of The Law Office Management Association

Stay tuned!

Daily Bread
Food Bank

At the TLOMA Holiday Networking Event held at Rosewater Supper Club, TLOMA Members donated $675.00 to the Daily Bread Food Bank

Save the Date

25th Annual
TLOMA Conference

September 25-28, 2013

Sheraton on the Falls, Hotel & Conference Centre
Niagara Falls, Ontario

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How to Write Better

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Our Site is a Mess on my Tablet

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TLOMA Today
Editor: Janet Baker
Advertising: Liz Barrington

2012 TLOMA President

2013 TLOMA President

By: Karen Gerhardt & Janice Rooney

PRESIDENT'S MESSAGE

The year is now drawing to a close and, as the President for 2012, I have to say that I am sad to be moving on. I have had the extreme pleasure of working with incredible people on the Board of Directors this year. What a RUSH!

We have seen some memorable changes in the past year. They have included things like the change to Flip Technology with our TLOMA newsletter, which enabled our publication to become more progressive and "trendy". The new website was launched just before the Annual Conference, and the introduction of a new mobile application provided the delegates with the Conference schedule on their mobile device.

Our 24th Annual Conference was a SMASH hit with such great speakers as Arlene Dickinson and Mike Lipkin - speakers we normally would not have had the opportunity to hear. Nora Spinks provided a great workshop on Mental Health and how to recognize problems and symptoms of mental health issues in the workplace while Sharone Bar-David delivered a seminar on Dealing with Abrasive Leaders. We were able to collaborate with HRPA to credit points towards CHRP accreditation for both seminars.

Our committees deserve acknowledgment and our gratitude for their contributions throughout the year. The Compensation and Benefits Committee provided a first-class survey that has always proved to be a valuable tool to our membership. The Nominating Committee was resourceful and procured the new 2013 Board of Directors - no simple feat. Our Conference Committee did a fabulous job at making the Annual Conference a remarkable success with their endless commitment and creativity. Last but not least our Website Committee volunteered numerous hours to make the new Website a useful benefit to you, our members.

If you haven't already, I encourage you to volunteer your time to be part of these incredible committees as you are sure to reap the benefits of self-gratification and self-fulfillment in every part of your soul.

And now for our last great achievement of the year! I am happy to report that we are now able to web conference our meetings through Pragmatic. We will be able to have up to 100 registrants on-line listening to our meetings. It also gives us the capability to provide video conferencing in the future. It requires Adobe software and easy-to-follow instructions. I know that the members have been waiting for this opportunity for a long time, and I want to thank you for your patience.

Thank you once again from the bottom of my heart for allowing me to be your President for 2012. It was a privilege and an honor for me to serve the membership this year. I want to take this opportunity to thank all the members of the 2012 Board of Directors for their contributions, collaborations, creativity, and wisdom. What a team!

And now I pass the President's Message on to Janice Rooney for a few words.......

Thanks so much Karen and may I say that I have very large shoes to fill!!

What an extreme honor it is to be taking the reins from such a great role model and mentor. Excitement and anticipation are overflowing as I look forward to working with the Board of Directors to serve our TLOMA membership in 2013.

"Watch this page" as we journey together through the upcoming year. Life is always going to be a roller coaster ride; it's all about looking forward to the crazy highs in store and seizing the right moment to add to the thrill and excitement – yes - that is life. We will travel together down a road of continuous improvement, continuing to effect positive change and share knowledge with one another for our mutual benefit. I look forward to the journey this coming year!

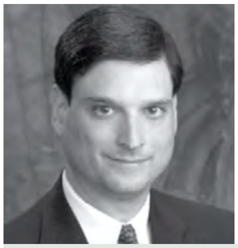
On behalf of Karen and myself, have a safe and happy Holiday Season and see you all in the New Year!

***Remember:* Be great, be positive and considerate of others and you will succeed! Most of all laugh; enjoy what you do and have a little bit of fun everyday!**

Karen Gerhardt
2012 TLOMA President

and

Janice Rooney
2013 TLOMA President



By: Perry Brock

VENDOR MANAGEMENT -
A VIEW FROM BOTH SIDES OF THE DESK

Introduction

The relationship between the receiver and provider of products and or services can be extremely symbiotic or completely disastrous. Most relationships fall somewhere in the middle.

As a manager and now the owner of a consulting practice who provides interim management services, I have had the opportunity to sit on both sides of the desk, as the recipient of products and services as well as the provider.

The following describes different types of vendor relationships and the evolution of the interaction.

Vendors vs. Partners

Vendors are described as companies, people, etc. that provide things that people want or need, especially over a long period of time and can be viewed as a partner or a supplier. A supplier is a party that supplies goods or services. A supplier may be distinguished from a partner who commonly adds specialized input to deliverables.

A partner, on the other hand, is a company with whom one shares a closer relationship. A supplier can be viewed as tactical, providing commoditized products or services, while a partner can be trusted to have "Got your Back", someone of a close affinity that is by your side to make sure that you make it through the troublesome, difficult, or tedious times. This doesn't suggest that one is better than the other, they are just different.

The following chart illustrates some of the characteristics of the two types of relationships.

CRITERIA	SUPPLIER	PARTNER
Financial Approach	Sees Revenue for the short term	Sees Opportunity for the long term
Executive Involvement	When Problems Develop	Continuously
Project Management	Command & Control	Collaborative
Knowledge Transfer	Minimal	Viewed as a Mentor
Issue Management	Reactive	Proactive


100%

VENDOR MANAGEMENT - A VIEW FROM BOTH SIDES OF THE DESK CONTINUED....

The relationship with a supplier is almost immediate and takes little time to develop. The partnership is an ongoing evolutionary arrangement that may go through several iterations before reaching full maturity.

Key Factors in Vendor/Partner Management

When working with a vendor regardless of the type of relationship, a number of factors should be considered to avoid any surprises down the road. These make up the due diligence conducted when evaluating or considering starting to do business with a vendor or maintaining or expanding the current volume with an existing vendor.

Relationship

Consider what the relationship will be, is it a short term or long term commitment? This is crucial if the products and/or services are vital to the business and its success. Some questions to ask:

- Will this be a good fit, are there common goals and vision and an alignment of expectations?
- What is the experience of the potential partner in terms of the products and services to be provided. Who will you be working with, consider meeting them before any commitment is made.
- Ask for a client list, not references. No one provides a bad reference.
- What are the issue resolution procedures, identify an escalation path before problems arise. Know who you will call to get things fixed quickly and appropriately.

Performance

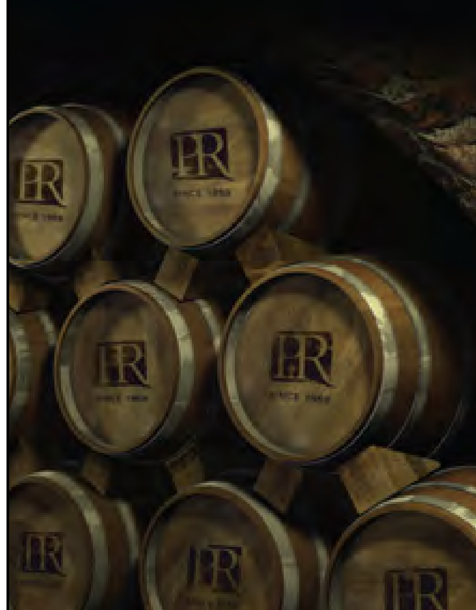
Promises are made when a new relationship is being considered. Successful vendors are those that can deliver on those promises. So, how will the performance against those promises be tracked and assessed. It is vital to agree on metrics upfront so quantifiable guidelines can be put against expectations. Whether it is on-time delivery, spend against budget or accuracy of an order or service. Always have the vendor send regular numeric measures on how they are doing.

The written agreement of what is to be provided by when and how much it will cost is the corner stone of the relationship. Long gone are the days of a "handshake agreement".

Contract

The written agreement of what is to be provided by when and how much it will cost is the corner stone of the relationship. Long gone are the days of a "handshake agreement". The contract puts in writing all the necessary criteria so no "misunderstandings" happen. Items to be included in the contract are:

- Scope of services - list of products and/or services to be provided, by when, costs.



VENDOR MANAGEMENT - A VIEW FROM BOTH SIDES OF THE DESK CONTINUED....

- Always ask what is included and what is **NOT** covered by the contract.
  You may be surprised by the omissions!

- Termination - how do we get out of the contract if we choose. What happens when the contract ends, WATCH OUT for automatic renewals!

- Remedy - how much time is afforded to remedy or cure issues and does this include any financial penalties.

- Service Level Agreements (SLA) - these are guidelines for performance that will be used to measure the success of the relationship. Some SLAs include actual price vs. budget, on time delivery and delivery accuracy, problem notification response and time to resolution

- Contract flexibility - can the terms and conditions be expanded or reduced during the term. Clearly specify how that is carried out and at what cost.

3 Phases of Beginning a Vendor Relationship

Independent of the type of relationship that will be established, three components of how it develops from introduction to activation can be considered.

The Introduction

There are several ways the introduction to a potential vendor can occur:

- **Cold call**, where a vendor initiates the overture by reaching out without prior contact. We are all recipients of this type of interaction and many of us receive ongoing cold calls both professionally and personally. With the cold call, it is best to address it as quickly as possible by telling the vendor that i) you are not interested and don't call back, ii) asking them to call back at a different time if there is some interest or iii) scheduling a meeting to hear what they have to say. If there is interest, my preferred approach is to take control of the interaction and schedule a discussion at my convenience not theirs.

Regardless of the approach, remember to "close the loop" otherwise there will be repeated calls from the vendor.

- **Networking**, where you would ask your professional contacts who they do business with in order to secure the product or service interested in. This approach is a filtering in nature approach as dissatisfied customers rarely want to provide a negative referral. The advantage of networking is you get a limited number of "tested" vendors; the disadvantage is potentially missing a player in the market not engaged by your network.

- **Tendering or Request for Proposal (RFP)**, publicizes your need for product or services and invites a group of vendors to respond. This is an expensive and time consuming approach and is only used for high value initiatives.

- **Sole Source**, the reverse of the Tender is to go sole source, this is when you go to a single vendor, known or otherwise, to provide what is required.

Regardless of the approach, ensuring your due diligence is properly conducted, and done as mentioned above in **Key Factors in Vendor/Partner Management,** is critical to securing the suitable vendor.

Courtship

Courtship is considered to be the period in a relationship preceding the establishment of an agreement. This period, prior to entering into a costly and long term arrangement will make or break the deal. Fully understand the Expertise and Capabilities of the candidate vendor, look at Partnership potential, ensure that goals & vision are aligned and that your expectations are communicated clearly up front.

Checking references is a step that is dismissed quickly as a candidate will never provide a bad reference. Speaking to customers can provide tremendous insight, both good and unfavourable. One approach I like to take is to ask for a client list as opposed to references. From there, you can pick and choose who you

VENDOR MANAGEMENT - A VIEW FROM BOTH SIDES OF THE DESK CONTINUED....

like to talk to. In cases where some smaller vendors maybe be fearful of providing a client list, ask for 2 to 3 happy clients **AND** 2 to 3 unhappy or dissatisfied clients. The dissatisfied clients are those that had or are still having problems. If the candidate vendor says there are no unhappy clients, well then the choice is yours whether to proceed.

Partnership

Once a preferred vendor is identified, then the contract/agreement is executed. As identified above in Contracts, fully negotiate, understand and agree to the terms and conditions, particularly term, renewal and early termination.

Always make sure that fully executed (yours and vendor signatures) contracts are filed, either in paper or electronically for future reference. It is also suggested to keep a record of all agreement expiry dates either in a calendar or spreadsheet. This way, any automatic renewals can be dealt with in advance if desired.

Again, always identify what's NOT included in the agreement up front. Parties are always told of what they are getting and rarely informed of what's not included. Know this upfront, the results may surprise you.

Strategies to Strengthen Vendor/Partner Relations

As part of the ongoing relationship, be sure to work together regularly to strengthen the relationship in order to build partnerships for the long term. Share information and priorities. Don't share confidential information or enter into a Non Disclosure Agreement.

Allow key vendors/partners to help you strategize. Let your partner know where you are headed and make sure they have the resources to support you all along the way. Balancing commitment and competition ensures that you are aware of what is in the market and commercially available. For products, keep an eye on competitive pricing just to satisfy the question of value.

Seek to understand their business so you develop an appreciation of their environment and marketplace.

Negotiate to a Win-Win agreement that helps both parties start a relationship on a positive note. If one party perceives they are being taken advantage of, a long term partnership will never mature. Come together on value so to contribute to the profitability of both parties. Unprofitable vendors don't last very long.

Meet regularly, not only when there are issues. Monthly, quarterly or semiannual business reviews bring both parties together to review the relationship and work together to grow it.

Determine within your firm who owns the relationship with the vendor so no confusion arises when escalation is needed.

Summary

In summary, do your due diligence when choosing a vendor whether it is a supplier of a commodity or a partner of strategic products or services. Make sure there is a good fit, not only on pricing but on objectives and commitment. Understand the contract before

VENDOR MANAGEMENT - A VIEW FROM BOTH SIDES OF THE DESK CONTINUED....

signing and make sure that it is properly executed and filed for future reference.

Maintain and grow the relationship by communicating regularly to review performance and adherence to the agreement. Deal with issues up front before they ruin the relationship.

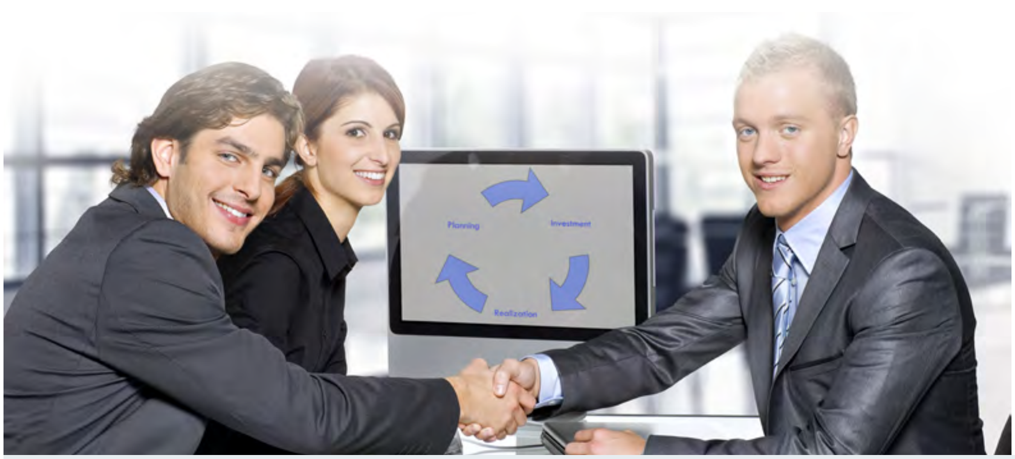
Determine within your firm who owns the relationship with the vendor so no confusion arises when escalation is needed.

Finally, be open and honest with vendors and demand the same from them as they are key players in the health and well being of you business.

Perry Brock, P.Eng perry@venturaway.com is owner and managing director of Ventura Consulting, a business technology company specializing in maximizing the use of technology within public and private organizations.

As an IT Professional with 25 years experience, Perry has been responsible for strategic and operational leadership in planning, executing and spearheading technology and business transformation initiatives. His consulting experience has been directed at strategic planning, program and project management, interim management, merger and acquisition and operations improvement in multiple industries.

Perry has served at the executive level at DHL, Alliance Communications, Delta Hotels, Etobicoke General Hospital and KPMG and holds a Bachelor of Engineering from McGill University.



Paul Byrne was a guest speaker at the TLOMA 2012 Conference

By: Paul Byrne

HELP! MY LAWYERS NEED CREDITS

As the December 31 deadline looms closer, TLOMA members are hearing the cries from concerned lawyers that they need more continuing professional development, CPD, credits. The inconvenient truth is that these lawyers' concerns are very real. Using Ontario as an example, lawyers and paralegals may be administratively suspended if they fail to meet the 12 hour CPD requirement. They will only be re-instated when they complete their missing hours.

But what's a firm to do? Professional development budgets are at a breaking point in most small to mid-sized firms. The cost of sending lawyers to conferences and CLE events is steep: attendance costs, lost billable hours, for some: travel and accommodation expenses, etc. Yes, the deadline is looming close, but no need to panic. As with many of our needs, the Internet is here to help.

Canada's law societies recognize the problem and as a remedy are now allowing web based on-demand videos as an eligible educational activity. Different jurisdictions have different rules about viewing on-demand videos, so it's best to check your society's website for the most up-to-date allowances.

In Ontario, lawyers and paralegals can view up to 6 hours of on-demand video without a colleague present. Beyond 6 hours of video viewing, they must view in the presence of a colleague. It should be noted that the 9 "Substantive" hours can be comprised of "Professionalism" hours and/ or hours not necessarily within a lawyers practice area. For example, any lawyer can use a talk from a financial advisor, health professional, etc. towards their substantive 9 hour requirement if the lawyer feels the content is of professional value.

Aside from the law society's live and archived webcasts, there are some online providers worth mentioning. CPDonline.ca is an Ontario based provider with on-demand, mobile enabled, accredited professionalism and substantive content. Online.cle.bc.ca is a B.C. based online provider that offers a wide range of CLE content. Finally, the Practicing Law Institute, PLI, is a U.S. based provider that some larger Canadian law firms have subscribed to. PLI offers an extensive amount of content in a variety of formats: mp3, web segment, video downloads, DVD, CD, etc.

These sites, and others like them, allow lawyers and paralegals a convenient opportunity to access and view continuing professional development content as required by their respective law societies.

For TLOMA members, breathe a sigh of relief...help for your lawyers is here. It's as simple as Click, Watch, Credit.

Paul Byrne is the President of cpdonline.ca. He is a tenured professor of communications skills and has also been delivering professional development seminars to lawyers for over 11 years. He can be reached at Paul.Byrne@cpdonline.ca.

Visit us at: www.cpdonline.ca.

Life Members
attend TLOMA Networking Event

It is TLOMA's pleasure each year to invite Life Members to attend the TLOMA Holiday Networking Event. These individuals have made an significant contribution to the Association.

Pictured from left to right (back row)
Dennis Nault, Christine Bogle, Alan Greaves, Susan Hodkinson, Charles Bennett, Susan Bennett
(front row)
Marg Parker, Julie Bean, Dee Nevett

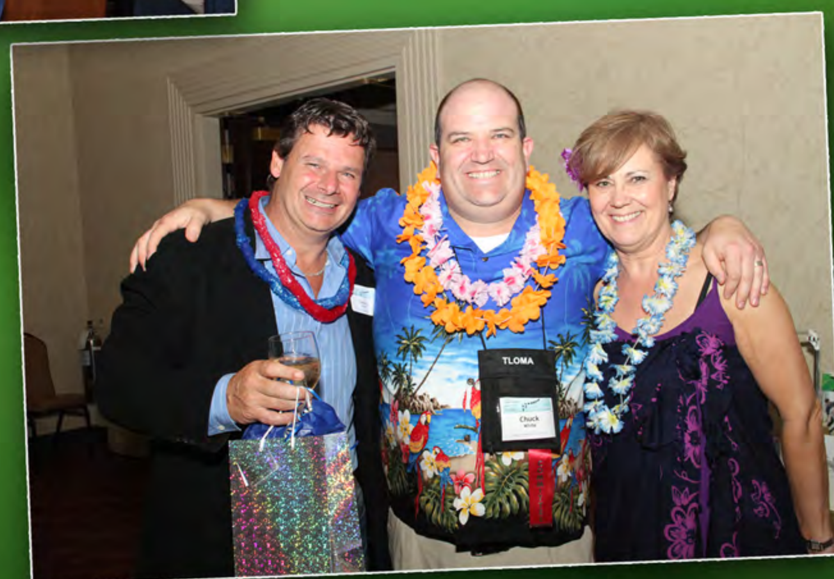
2012 Conference
Business Partner Green Awards

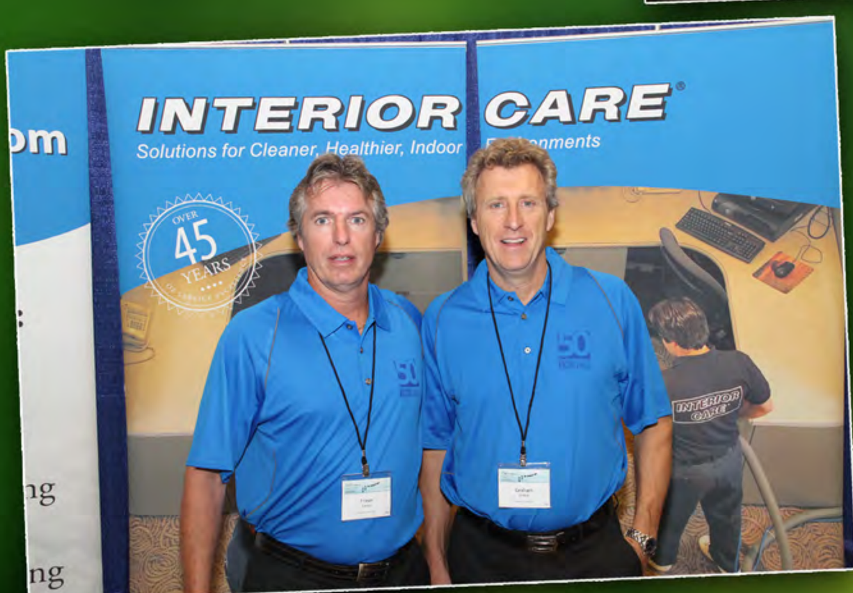
1st Place
Imperial Coffee and Services Inc.

Once again Imperial Coffee and Services has won the TLOMA Green Award based on their outstanding commitment to sustainability and environmental initiatives. For many years Imperial Coffee has led the industry with cutting edge bio-degradable packaging, a wide variety of eco-friendly brew systems, recycling and upcycling programs.

2nd Place
Ricoh

First time winners, were nominated for their wide and formalised greening programs which include, pursuing both environmental conservation and profit generation at a high level through its sustainable environmental management. Ricoh has developed an Environmental Action Plan to ensure the participation of all their employees and to develop environmental technologies.





3rd Place
Interior Care

Also first time winners, Interior Care, among other things, was recognised for supporting the environment by only using a “green” label product line that is certified with an Earth Friendly Label which ensures a dust and allergen free environment.

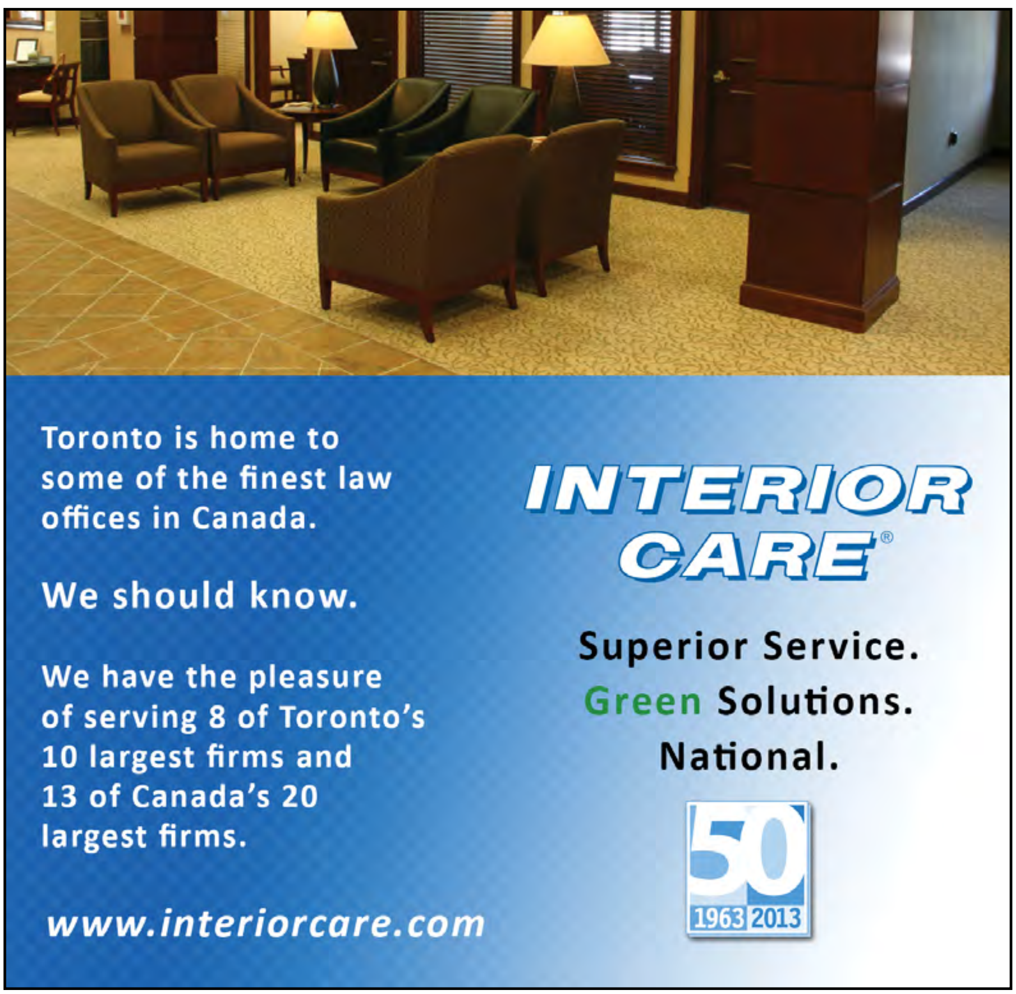
By: Carlos Seoane

CONQUERING THE E-BILLING CHALLENGE

For several years, it has been clear that, for law firms, electronic billing is here to stay. In theory, the benefits are clear - receiving bills electronically through a single interface allows the corporate legal department to route, review, and approve them. Thus, a law firm should be able to ensure compliance with clients' guidelines, expedite dispute resolution, create valuable data that can be subsequently mined, "go green" by cutting down on paper, and ultimately accelerate payment cycles. In addition, corporate legal departments continue to embrace e-billing as the wave of the future.

The Issues of e-billing: It's Complicated

However, along with the theoretical benefits come some concrete drawbacks. An examination of the current legal e-billing situation shows that the playing field is complicated and complex. At the latest count, there are six official industry standards for the submission of electronic bills (LEDES98B, LEDES98BI, LEDES98BI V2, LEDES XML 2000, LEDES XML 2.0, and LEDES XML 2.1), well over ten vendor-specific formats, and dozens of clients who require something else, either variations of a standard or a totally different type of file.



When you add to this complexity the more than 40 commercial legal spend management systems available, what should be a straightforward process becomes an incredibly complex, expensive, and error-prone undertaking. Not only do law firms now need to increase their billing and IT staffs to comply with ever-changing requirements, but it's also nearly impossible for the billing staff to keep track of the e-bills they've sent to the different spend management vendor sites.

Based on our recent analysis, there is no indication that this complexity is going away any time soon. In fact, it will get worse: we at eBillingHub see a consistent 30 percent year over year growth in the number of e-bills our law firm customers submit. We also see a constant stream of corporate legal departments moving from paper to electronic billing—an average of 40 new corporate clients per month are being added to our library of almost 4,000 who already require electronic billing. In addition, anecdotal evidence shows that corporate legal departments are moving to e-billing faster than ever before, but are less prepared. And, the less prepared the law firm's client is, the more issues and slower payment their firm will experience.

The Good News: Firms Can Do Something About It

So what can law firms do about the incoming tsunami that is e-billing? Fortunately, there are several steps firms can take to stay on top of the wave. The first recommendation is to research reputable electronic billing software solutions, and then purchase the solution that best fits your firm's needs. Electronic billing is simply too complex and too important to a firm's bottom line to be done manually or with ad-hoc tools.

However, whether or not your firm uses electronic billing software, there are several steps you can take that reflect best practices and that make dealing with e-billing more straightforward and efficient:

CONQUERING THE E-BILLING CHALLENGE CONTINUED....

- Place your e-billing activities within your billing organization
- Train your lawyers on billing codes and practices
- Minimize hand-offs for fewer mistakes
- Define an escalation path
- Help your clients get set up with e-billing

Keep E-billing in Billing

Even though the bill is electronic, IT should not be submitting it. All billing, including electronic billing, should be done from accounting with the support of the IT department where needed. We have seen firms place electronic billing in the IT department usually with disastrous results. In one extreme case, we know of a firm who saw their IT department modifying bill amounts to get past a client's rejection.

.....more and more corporate legal departments are moving to e-billing without adequate preparation. The main result of this lack of preparation is slower payment to their law firms

Impose Discipline on Your Lawyers and Train Them in E-billing Codes and Practices

Easier said than done, but the better the processes are upstream, the less rework your accounting team has to do, and the faster your firm will be paid. For example, it is important for lawyers to know that certain words in a narrative will always trigger a rejection. Eliminating the need for billing to edit narratives (which usually requires a discussion with the lawyer) ensures faster processing and payment.

Minimize Hand-offs for Fewer Mistakes

Do not differentiate between billers and e-billers. Try to have continuity within the billing process so that a certain biller always bills the same client, regardless of paper or electronic. The more familiar a biller is with a particular client's idiosyncrasies the fewer bills will be rejected.

Have a Clear Escalation Path

Firms should assume that some percentage of electronic bills will be rejected. In our experience, that percent can run from 18 to 40 percent, depending largely on which legal spend management vendor the client is using. Make sure your billing manager has the bandwidth to handle rejected invoices and the authority to modify them as needed to ensure payment.

Help Your Clients

As mentioned above, more and more corporate legal departments are moving to e-billing without adequate preparation. The main result of this lack of preparation is slower payment to their law firms. A good example of this is matter configuration – when your client forgets to set up a matter in their legal spend management system, every bill sent to that matter will be rejected, even if the bill is perfectly correct. We recommend using a checklist to help your clients through the setup process. When you help them, you are helping yourself.

E-billing: A Matter of Staying on Top of a Changing Situation

As you've seen, the trend towards more and more electronic billing shows no sign of slowing down. What started with large insurance defense is now expanding across other practice areas and to every type of corporate client. Law firms should assume a constant increase in the number of e-bills they submit every month and plan accordingly.

For more information on e-billing challenges and solutions, please download the white paper "Challenges and Solutions for Electronic Billing," at http://ebillinghub.com/customers/case-studies-and-whitepapers/

Carlos Seoane is the General Manager for eBillingHub, a SaaS e-billing solution that helps law firms quickly and effectively respond to client demand for electronic invoicing. The e-billing process is dramatically simplified through a single portal resulting in reduced write downs and improved cash flow for law firms. eBillingHub is the solution of choice for over 50% of the Am Law 200 and processes close to two million invoices every year. For more information, visit eBillingHub.com or email info@ebillinghub.com.

By: Heather Colman

BUILDING A BUSINESS CASE FOR AN EXTERNAL BLOG

My firm launched its first external blog in June 2010 called Human Resources Legislative Update. The blog replaced a monthly newsletter on statutory changes in human resources law that was sent to clients by email and posted on our website. The newsletter was not the ideal format to report legislative news because legislation is constantly changing, often passed without notice and dated by the end of the publishing cycle. We also did not know how many people were reading the newsletter and if they had any questions about the legislative change. We needed a time sensitive solution that was accessible 24/7 to our legislative writers, provided a quick & easy publishing solution and gave readers the ability to ask questions or leave comments. The Knowledge Management Group had already successfully launched an internal blog that had similar features, so we proposed an external blog to our Executive.

As I was writing this column, a blog entry by Sean D'Souza entitled "5 Reasons Why No One Is Reading Your Email Newsletter" appeared on Twitter and LinkedIn. The five reasons included content which was not useful & involved self promotion; using a voice that is not compelling; lack of structure; lack of communication regarding certain actions and lack of frequency.

Our blog business case addressed the lack of frequency due to the fact that the newsletter was published on a monthly basis. It proposed that a blog would be an ideal platform to deliver legislative news on a more timely basis. It also included a recommendation to outsource the blog design to a vendor who specializes in developing and hosting legal blogs.

The content was ideal for the firm's first foray into the blogging sphere because it was factual and authoritative. Each blog entry would be a short, succinct summary of the legal change and it's impact on our readers. Blog posts would be targeted to a niche audience interested in specific legislative developments that could be found through topics and tags. The postings would be frequent due to constant statutory change while the legislature was in session. We launched in June 2010, a week before the legislature adjourned, with content dating back to April and have added entries at least once a week since the launch. The proposed bloggers were non-billable Knowledge Management lawyers who were subject matter experts, authors of the legislative newsletter and the internal blog. They were already familiar with wikis and blogs and excited about a blog platform that would expedite the publishing process and be available afterhours and outside the office.

The blog turned out to be a perfect alternative to the legislative newsletter because it is a live, instantaneous forum for internal and external stakeholders interested in statutory developments. The short summaries on our blog complement the in-depth analysis and commentary in the publications that are posted on our website. Some posts reference and link to commentary which helps drive traffic to the firm's website and increase their Google search ranking. Readers have the flexibility of receiving blog updates through RSS or email notifications or by visiting the site.

As anticipated, our legislative blog has provided an excellent platform to reach out to "niche" audiences and to convey information that is constantly changing. Its success as an alternative communications vehicle, led to the launch of the firm's second blog in October 2012 called Case in Point. That blog tracks case law developments in human resources law.

This article is a modified version of a column that was published on SLAW, Canada's online legal magazine, on April 17th, 2010.

Heather Colman is a Knowledge Management Specialist at Hicks Morley, responsible for developing leading edge technology solutions and processes for managing intellectual capital and work product. Heather has expertise in social intranet software, document management, and social networking tools that help improve collaboration, knowledge sharing and information retrieval. Heather works closely with the IT and Marketing groups at Hicks Morley, is a member of the firm's Social Media Committee, participates in firm wide Knowledge Management initiatives. Heather is a legal marketing columnist for SLAW, Canada's Online Legal Magazine, and speaks frequently at conferences, seminars and workshops.

By: George Salov

CLOUD COMPUTING FOR SMB

Yesterday I was searching for “Cloud Computing” on the Internet and the search returned over 84 million results. After spending time reading through some of the articles I became confused. And then I asked myself “If an IT professional is getting confused about this topic then how about the rest? How is a small business decision maker going to find their way in the Cloud?”

A change of this magnitude commonly results in excitement and confusion at the same time; this is a natural and necessary process. The Cloud computing trend is bringing the kind of change comparable to that brought by introduction of PCs to the business sector 30 years ago. The difference is the magnitude and the complexity of the change stemming from widespread use of computers in a variety of operations and tasks. Multiple technologies have developed rapidly over the last several years which resulted in the appearance of what is now known as “Cloud Computing” with its many benefits and some limitations. The changes are fast, profound and multi-layered, and the end users along with the Information Technology community are trying to make sense of all of this. This process will take time, but for now let’s talk about how this Cloud idea can benefit businesses today. We will also cover some areas of concern and caution in assessing your needs and options.

The Cloud computing trend is bringing the kind of change comparable to that brought by introduction of PCs to the business sector 30 years ago

Working with small and midsized businesses (SMBs) for the last 10 years helped me to appreciate their challenges in technology. I can say with confidence that the Cloud opens opportunities to these businesses that are often not available to larger businesses. SMBs often have a relatively simple IT infrastructure and related procedures, which allows them to transfer their entire infrastructure, or a significant part of it, to the Cloud in a few months. In Cloud Computing terminology, this is called “Desktop-as-a-Service” or “DaaS” model. With careful planning, this could be a very beneficial step for the business.

Evaluate the Readiness of the Business

Designing a strategy of IT future needs allows for planning ahead in a proactive, instead of a reactive mode. It is a good practice to periodically evaluate the business instead of going through random replacement of the older systems year after year. For example, a good strategy is to plan for a migration to the cloud solution when multiple older computers, servers or applications are reaching their end-of-life date. On the other hand, if multiple recently purchased applications are running on all new computers or servers, it may be more cost-effective to plan for a major change few years down the road. Many other factors need to be considered along with the analysis of the current costs of IT.

Select the Most Suitable Cloud Provider

Not all providers are equal and offer the same solution. That is the confusing part about the Cloud as many business owners assume that various vendors will offer the same or similar solution when speaking about the Cloud. Selecting a Cloud provider is no different than selecting any business partner, but there are some specifics in this process which you must take into account. First, the provider needs to have available the Cloud service your business requires - Desktop-as-a-Service. From my experience, a HelpDesk service must be part of their offer. In my opinion, there are currently two categories of cloud providers. The first one includes the larger IT companies and telcos that provide services designed to accommodate larger corporations with a greater number of users. The second category includes a spectrum of small IT providers that are more likely to provide Cloud service tailored to small businesses. The concern with these smaller providers is financial stability. As a result many of them chose or are forced to merge with other smaller providers to reach stability that will allow for growth and investment in technology. So, choose wisely.

Selecting a Cloud provider is no different than selecting any business partner, but there are some specifics in this process which you must take into account.

Be Realistic and Adjust your Expectations

While it is true, the Cloud offers many benefits, one needs to have their expectations set correctly. Often Cloud Computing is presented as panacea for all your computing issues at half the price. Let's start with the price then...

Cost Savings. Currently for a small business with less than ten users the cost savings of the Cloud may not be significant if at all. The higher the number of users, the greater is the potential for savings, which in some cases may be as high as 30% or greater.

Time/Productivity. This is another factor that translates into cost savings and in my experience is one of the greatest benefits of the Cloud for small business. Some of the reasons are: improved end user support, stable access at any time from everywhere with most devices, fast recovery from failure, flexibility in adjusting the systems' resources as needed.

Technology Related Risk Reduction. This should result from selecting the proper Cloud solution because of improved security, data backup and recovery, disaster recovery, etc.

Level of Support. While it's true that the Cloud provider will take responsibility for most of your IT needs as part of the service, there are few items left on-site, which may be excluded, such as printers, local connectivity, end-user devices, etc. Also, support of your business applications is a critical part of the business stability. While the cloud provider will make sure the applications have all the computing resources necessary, the application vendor support for troubleshooting and upgrades is crucial for business and often is required by the Cloud provider.

And last but not least is your ***Connectivity to the Cloud***. When your IT is not on-site your connectivity becomes your lifeline. At a minimum, your business will need a secondary connection to the Cloud for failover purposes.

Migration to the Cloud

The transition to the Cloud, if done properly, will not only result in the benefits of Cloud Computing, but can also lay the foundations for a strong and hopefully, long-term relationship with your provider. I would like to mention three items of the migration process which, in my experience, are critical for success - ***working with the provider, communication and project management.***

1. Although the Cloud provider should do the heavy lifting and guidance, you, as business owner or decision maker will need to designate somebody from your staff to work with the provider to facilitate the process.

2. Migration to the Cloud is a big change not only for the business, but also for the employees and your current IT vendors. Ensuring proper and timely communication as well as the feedback of end-users and vendors when practical and appropriate is part of the process. It may sound like more work during the migration, but will pay off handsomely once you are in the Cloud.

3. The migration to the Cloud is a precise and sophisticated procedure. Making sure your Cloud provider is running it as a formal project, with all deadlines/timelines outlined well in advance and reviewed regularly will make for a smooth transition and reduced stress levels, which is often the main objective of this change.

George Salov is an independent consultant with over 30 years of experience in the IT, most recently as a Project Manager. Since 2002 George has helped over 70 small and mid-sized businesses with their migration to the Cloud. You can contact George at george.salov@gmail.com or through LinkedIn at http://www.linkedin.com/pub/george-salov/14/500/a9

For more information feel free to review the following presentation: http://www.authorstream.com/Presentation/salovg-1506148-cloud-computing-smb/

By: Stephen Lewis

MAKING APPEARANCES:

TRANSITION FLOOR SOLUTIONS PROTECT YOUR IMAGE, INVESTMENT AND BUSINESS

As an office administrator, you understand the statement your office space appearance can make on behalf of your business. Attention to cleanliness is often the first thing employees and guests notice upon arrival to your practice, and dingy or dirty flooring can negatively impact perceptions about the space.

While you might think a quick solution is to have the carpet cleaned, chances are the issue will arise again if you don't have an indoor/outdoor transition matting system in place, as well as a regular maintenance program.

You may also realize the importance of maintaining a safe environment for staff and visitors that's free of obstacles and slippery surfaces. The proper entryway product will also provide a safe, non-slip environment for individuals who enter the building.

Read on to learn the facts behind transition matting, and how to choose a system that's right for your office:

The Dirty Facts

Before considering an entry mat product for your office, it's important to understand why this system plays a vital role in maintaining your flooring investment. Make yourself familiar with a few of the "dirty facts" the International Sanitary Supply Association has discovered:

- 70 to 80 percent of the dust, dirt and grime in public spaces are tracked in from outside of the building.
- One square yard of commercial grade carpet can accumulate one pound of dirt over a one week period – and over twice as much as in inclement weather.
- The estimated cost of removing a single pound of dirt from a building today can exceed $700.
- 30 percent of the dirt coming into a building is picked up in the first three feet of matting, while 90 percent is picked up in the first 25 feet.

A quality transition system will serve as a soil and moisture barrier system to stop, hold and hide dirt and water. The right product should significantly reduce the amount of soil that is tracked inside your office and onto your carpet.

The Safety Facts

In recent years, the most recurring type of liability case is a slip/fall or trip accident. When a visitor to a building trips over an obstruction or slips on a damp floor, the business is held responsible. Royal Insurance Company and Mutual Life Research Center have found the following facts:

- Accidental falls count for approximately 21 percent of the more than 90 million annual hospital emergency room visits.
- The average cost of an accident is $5,400.
- 10 percent of slip and falls occur on slippery floors, and the remainder occurs when changing floor surfaces.

A safe and secure entryway system will help prevent unnecessary injuries by providing a safe, non-slip environment as soon as employees and visitors enter the building.

Indoor/Outdoor Transition Areas: The Basics

A transition area is an entryway between your office's interior and exterior where a good quality entry mat product should be installed. This space serves as a soil trapping area to remove dirt, oil and debris from shoe bottoms. It also provides a dry surface for someone walking through your door, decreasing chances of a slip/fall accident.

MAKING APPEARANCES: TRANSITION FLOOR SOLUTIONS PROTECT YOUR IMAGE, INVESTMENT AND BUSINESS CONTINUED....

How to Choose the Right Transition Product for Your Office

Price often dominates the decision making process when considering entryways. While it's an important point, the life cycle and total cost of ownership should also be taken into consideration. Beyond the initial purchase, factors such as premature replacement, maintenance and slip/fall liability should be primary concerns.

Once you've determined your budget, find a system that is rated as a soil and moisture barrier system. Many entryway products are available, but not all are designed for the functionality or durability needed in commercial office spaces.

Last, but not least, consider where you live. Believe it or not, regional weather patterns will be the identifying factor in your decision.

For example, you should select a water-absorbent entry mat to reduce water tracking if you're located in a region with frequent snowfall. If you live in a warmer climate, choose an entry system that is designed to trap and hold dry grit.

How to Maintain Your Entry Mat System

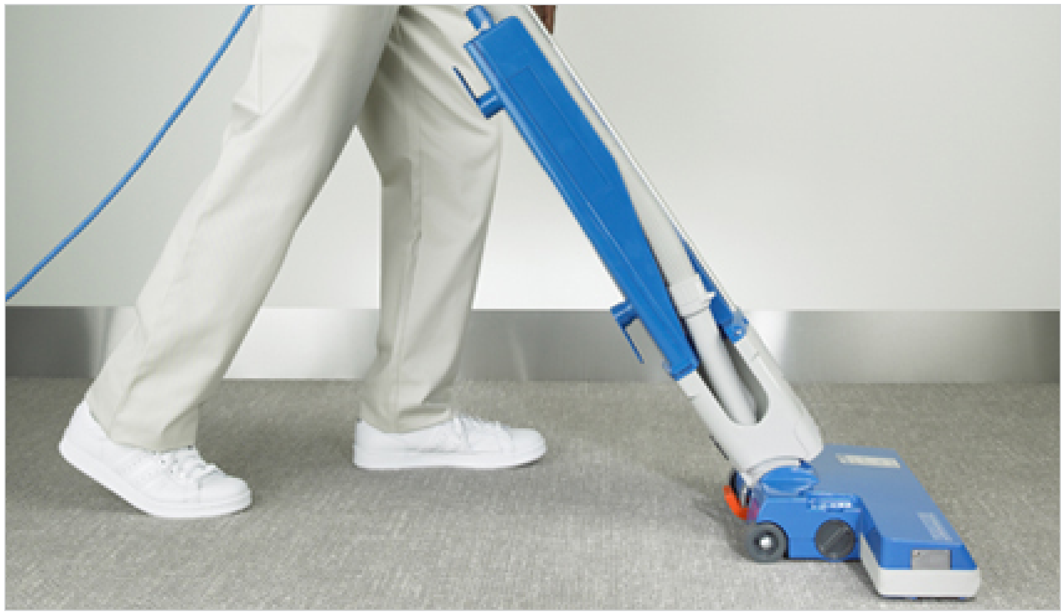
While soil tracking and eventual wear on flooring are inevitable, dirt that is tracked through a space (and not properly removed) will scratch and abrade carpet fibers much more quickly if a transition area is not installed. This will negatively impact the floor's appearance and cause irreversible traffic patterns.

The best, most durable transition product is virtually useless without a regular cleaning program. If the entryway is not maintained properly, soil and moisture will accumulate and create a problem, rather than a solution.

As with any facility, frequent vacuuming is most critical component in maintaining your entryway and carpet. The key is to remove dry soil before you see it by using a commercial upright vacuum with a beater brush.

Supplement this process with spot cleaning as needed, and use a professional cleaner on a routine basis to maintain the life and beauty of your flooring.

Flooring should be a priority when you consider your office's overall appearance and safety standards. Through the use of an effective indoor/outdoor transition area and proper maintenance, you can keep your office looking clean and professional, while also protecting your flooring investment and improving safety.



Stephen Lewis serves as technical director for MilliCare, a provider of environmentally sound textile and carpet cleaning services for commercial facilities. He is responsible for the company's research and development efforts, provides technical training to its network of more than 80 franchise partners and is the company's key point of contact with the textile and carpet maintenance community. For more information, visit http://www.millicare.com.

HOW TO WRITE BETTER

By: Michael Power

Just looking around, I would say that interest in the written word is at an all-time high. For that, we have technology to thank. Some might say that technology—the ubiquitous smart phone, tablet computer or e-reader—has been bad for literacy but I disagree. These technologies are everywhere and people spend more time writing to one another (in emails) than ever before.

I, for one, spend most of my waking hours at work in front of a computer. While many people in offices used to communicate by phone, or face-to-face, much of that has been replaced by email and texting. Most people probably do more writing than they realize. So it's more important than ever to ensure that you're writing as well as you can.

As an editor it's my job to ensure that the written words that go into my publications and on my website are as grammatically correct as possible. Whatever the business correspondence you're working on, be it an email, fax or formal letter, it pays to follow a few guidelines to avoid spelling and grammar mistakes. Here are a few tips on ensuring your everyday business writing is as good as possible.

Always Check Names

It's always worth the time to check to ensure you've spelled people's names correctly. I've received many emails, faxes and letters calling me Michael Powers, although my last name has no "s."

It takes only a few seconds to check a letter or email and ensure you've spelled all the names correctly. If necessary, double (or triple) check names, but ensure they're right.

Plan, Then Write

If you are producing anything more than the briefest of emails, it's helpful to outline what you're going to say before putting it on paper. Like the essays you wrote in high school, it pays to put together an outline and then stick to it as much as possible. Doing so helps ensure your thoughts, and therefore your composition, remain organized.

Check Your Punctuation

Emoticons—those smiley, frowning, confused or sad faces—seem to have made their way into business emails over the past decade. Indeed, they can show familiarity and friendliness, which may be something you want to convey to a client or trusted business partner. But I see them more and more often. Writers should exercise some discretion when using emoticons.

The same guideline applies to the use of exclamation points, which also seem to appear more and more often in emails. Surely, not everything is so important that it needs an exclamation mark. Everything from "have a great weekend!" to "I hope you're doing well!" seems to have an exclamation mark these days. They're not necessary.

Edit and Re-write, Even Just a Little

Not every email you send out is going to be a great piece of literature, but even the

HOW TO WRITE BETTER CONTINUED....

shortest email could benefit from a quick scan to ensure it's free of errors. I get emails with obvious gaffs in them all the time. Sometimes, I notice mistakes in my own writing that could have been avoided if I had edited more carefully. I've seen everything from emails addressed to "Dear insert name here," or a repeated word "I hope hope you're well." These are mistakes that could easily be fixed by paying a bit more attention to the words.

A trick that a senior editor once told me was to read your writing backwards, from end to beginning. I'm not sure why, but that somehow seems to make errors easier to spot.

Keep it Simple

Churchill said: "Short words are the best and old words when short are the best of all."

That means, avoid using big words because you think you'll sound smarter, and look for familiar words that people will recognize immediately. Use short words that everyone knows.

Keep your writing as simple as possible. It's easy for subject matter experts to slip into jargon used only in their field. Unless necessary, try to keep jargon out of your writing.

Study Good Writing

There are a number of great resources out there for those who want to do better in their writing. A few books have stood the test of time and can help the modern business writer make himself or herself better understood. Two of my favourites that have been around for a long time are The Elements of Style by Strunk and White and On Writing Well by William Zinsser.

Write as Well As You Can

There's no reason any writer of business correspondence cannot improve his or her writing, as well as ensuring the message of the correspondence is transmitted clearly. Good writing is the result of consistent practice and paying attention to detail. I'm convinced that anyone who is interested in doing so can improve their skills in this important area. A writer—even a writer of routine business emails—owes it to their readers to be as clear as possible.

And if you've found any errors in what I've written above, or have any ideas for writing for the publications I edit, feel free to send me an email at the address below.

Good luck, and happy writing!

Michael Power is editor of PurchasingB2B and Travel Management Canada. Reach him at mpower@bizinfogroup.ca. For further information about PurchasingB2B, please visit our website at www.purchasingb2b.ca. To subscribe, go to www.canadianmanufacturing.com/purchasingb2b/subscribe.

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By: Paul Kuttner and Jeff Sergeant

OUR SITE IS A MESS ON MY TABLET

The old news – There is a growing proliferation of mobile communication devices. Kids give their thumbs a full workout day and night texting. Business owners and executives are glued to their smart phones and now increasingly their tablets. The new news – Many websites are not easily read nor navigated on mobile devices.

The Platform Is Different

Mobile devices provide a platform that differs from a desktop or laptop computer – mobile devices are strictly for communication, entertainment and information gathering. Computers are designed for productivity. Advances in productivity such as the Cloud allow you to open their computer anywhere and carry on working.

Information gathering is really important to your business model because many possible prospects are gathering information on your practices and lawyers to form a decision whether or not to proceed down the buying path with you. That's all your website does. You don't engage in e-commerce, you don't sell services off of your site. If your site is not configured to be compatible with mobile devices, and many law firm websites are not, you have a problem.

There are many different website architectures including:

a. Template based such as Wordpress and Joomla
b. Custom coded

At the outset, if your site uses Flash, it will not function on any Apple device and certain other mobile operating systems. All movement, functionality, certain second tier navigation and creative pizzazz will be lost. Additionally, many features will not behave as they do on a desktop computer.

Aging custom websites displayed on older operating systems developed with obsolete or antiquated document types won't work properly and could be downright annoying to the Smartphone viewer. Elements such as forms and table-based layouts just won't work unless they have been upgraded.

Working with mobile requires acknowledging that a canvas is distinct from a desktop monitor in size, resolution and viewing impact. Honey I shrunk the screen!

Make Me Mobile

The explanation is quite simple. Your execution will take time.

In the process of creating a site today, developers utilize responsive web design and integrate user agents that detect what device, operating system and browser is being utilized by the visitor. Most websites now do not conform to specific standards which accommodate both desktop and mobile devices, regardless of brand.

What You Need To Do

Page by page and sub page by sub page you must review each asset on the screen. With an eye on simplicity (remember the screen size that will constrain you), determine which elements will stay and which elements will not appear on the mobile version as well as what elements need to be converted for mobile. Yes, you will have two distinct sites. Your developer will make a duplicate of the 'computer' version and this is what you will use to adapt for mobile. On the duplicate version all issues of antiquated and obsolete code will be dealt with so it will work smoothly on a mobile device. In addition, there is unique technology in mobile devices to exploit. If a page contains Flash elements – remove them. If a page is graphics intensive, strip it down. If you use PDFs or other third-party viewers, evaluate their restrictiveness. There are two good reasons for this:

1. Remember the size of the playing field – it can become awfully crowded
2. Mobile devices have much less upload /download capability than your desktop. Too many heavy graphics will affect page opening speed.

There may be a few golden rules in this upgrade process. One of them is: Build your mobile site to accommodate the lowest common denominator. This means that you should accommodate older devices as well as WiFi delivery in places that may be slow, even though you sport an iPhone 5. You appease the lowest common denominator to mitigate problems.

Updates

Yes, you must update both sites separately unless you are able to program certain macros and do it simultaneously.

Is It A Quick Fix?

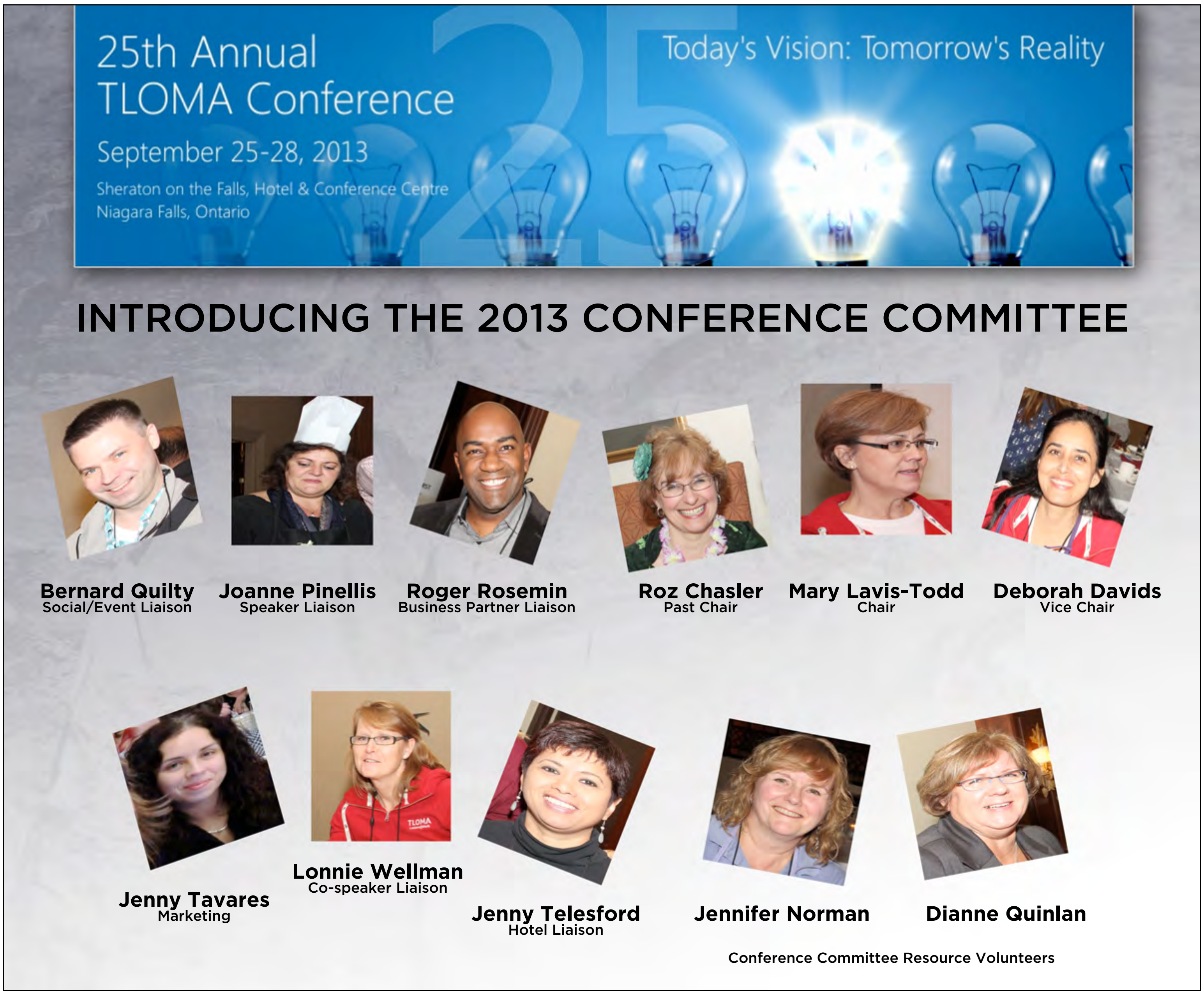
It depends. It depends on the complexity of your site, the absolute number of pages, the quantity and density of illustrations and graphics and photographs, forms and charts, pop ups and animation. It could be just a few hundred dollars. But you are advised to scrutinize all quotes. It requires work, but is not rocket science.

OUR SITE IS A MESS ON MY TABLET CONTINUED....

Do I Have To?

Only if you want easy navigation and readability of your website on a mobile device. It has to be done. You would be wise to make your website and blog sites mobile compatible now. Why? Clients and prospects in industry live on their Smart phones. They are also snapping up tablets. It matter not that the lawyers in your office don't own tablets. Remember who is at the centre of your business universe. Remember why you have a website in the first place.

> *Defy what other firms are doing and create a meaningful and distinctive brand for your law firm. Because around here, you are either a profitable leader or a petulant follower. Paul Kuttner - www.innovatemarketing.ca or Jeff Sergeant www.netadvantage.ca*



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Welcome Back!

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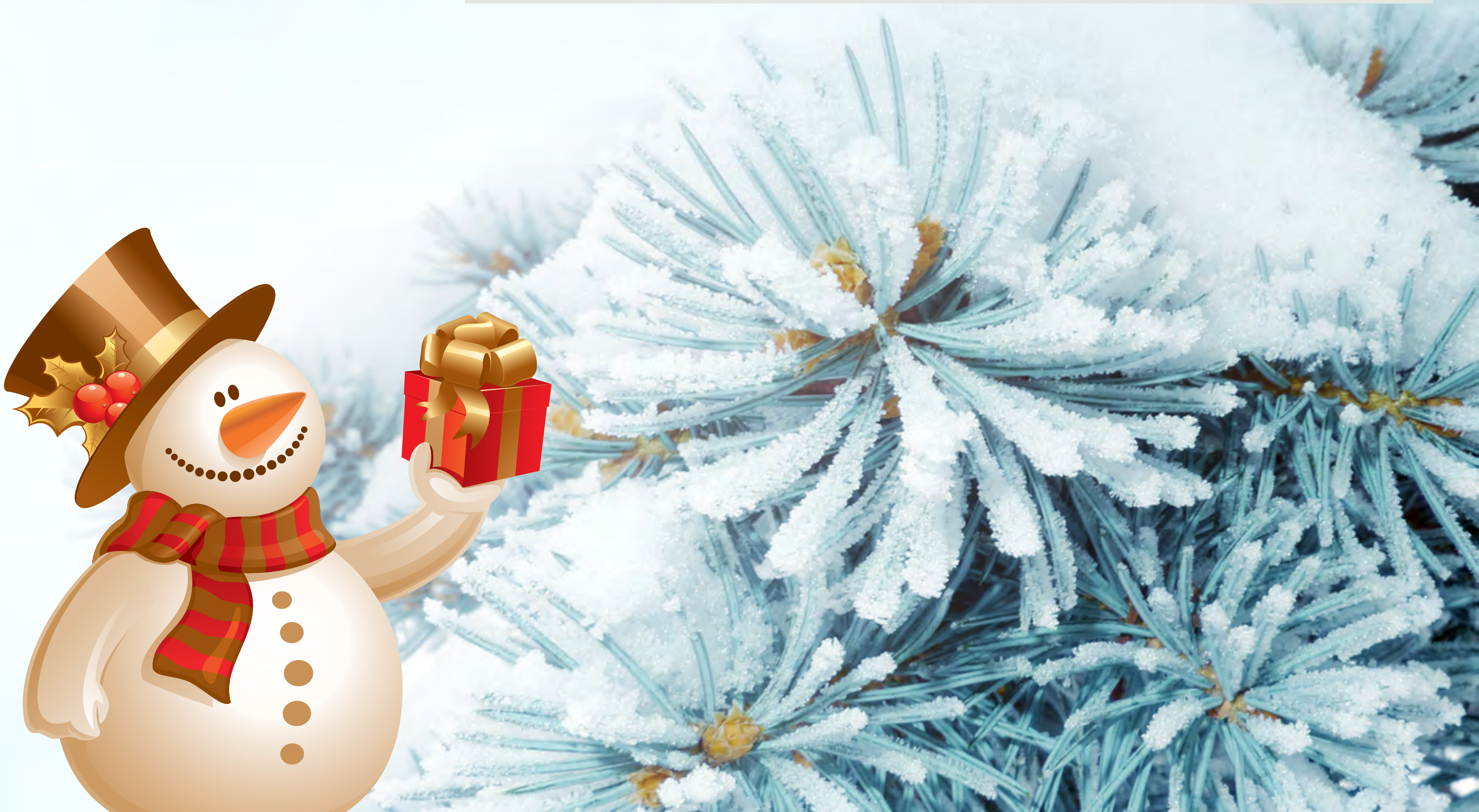

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1/3 Page Vertical	5.9cm W x 27.9cm V / 2.33"W x 11"V	$275
1/3 Page Square	12.1cm W x 12.1cm V / 4.75"W x 4.75"V	$275
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