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President's Message

By Christl Mittendorfer



Christl Mittendorfer

It is a lovely, but cool, fall Saturday and I realize that this will be the second last President's Message I will write. Time has passed so quickly and my year as your TLOMA 2010 President is slowly coming to an end.

It has been a very interesting, fun and at times a challenging year which I have thoroughly enjoyed. I wanted to take this opportunity to share with you some of the projects your Board of Director's has undertaken; some completed, some still ongoing and some will carry over to 2011.

The beginning of the year brought a couple of significant changes. One of them was the reduction of board positions from 10 to 9 by implementing some core succession planning policies to close a gap in our election rules and regulations, and to reduce some of the additional responsibilities of the respective positions. This means that as of January 1, 2011, the Conference Chair will no longer be a board position, but instead, will focus strictly on our annual Conference while liaising with the Vice President to keep the lines of communication with the board open. The same structure will also apply to the Compensation Chair position. This position will now solely focus on our annual salary survey without the additional responsibilities of running TLOMA's HR Special Interest Group, reporting to the HR SIG Leader.

Furthermore, as of 2010, TLOMA implemented its drink ticket policy providing a limited number of alcoholic beverages to our attendees at our networking events and our annual Conference. Most of the feedback to this new policy has been very positive. We are also finalizing our Social Responsibility Policy which will be available on our website very soon.

We have also established a Website Committee with its chair reporting to our IT SIG Leader. Recognizing that the website is the one constant presence that symbolizes TLOMA, it is our intent to provide current and useful online information including White Papers and an 'Ask the Expert' section to enhance your membership. Information will be available, accessible and informative – a great resource tool to assist in law firm office management.

Changes are also underway to make our Listserve more efficient. TLOMA's intention is to divide our Listserve into the same sections as our special interest groups to make the process more content specific. We will keep you updated and will confirm when the project has been completed.

By now, most of you are also familiar with our Volunteer Coordinator, Britta Schuelein, who has now established a volunteer database from which TLOMA will be able to draw. It will also help to ensure that every member who is willing to participate will have the opportunity to do so. Thank you to all who have answered our call via our extensive volunteer survey sent out a few months ago. If you have missed participating in that survey, please feel free to get in touch with Britta at bschuelein@stikemans.com to throw your name into the 'hat'.

Your board has also updated *TLOMA's Membership Benefits and Requirements* to open up membership to management assistants employed in a position in which job duties are management responsibilities for one or more of the activities set out in our 'Schedule A' (found on our website) and who are nominated by a supervising Director/Manager. We hope that this change will now give many who were unable to join TLOMA the opportunity to do so.

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All of the aforementioned changes are intended to make TLOMA a better association and provide our members with the tools and information they need.

There are a few more projects we have undertaken which I will report in my December message. If you have any questions at all, either access our website at www.tloma.com to find the information you are looking for or feel free to get in touch with me at cmittendorfer@rickettsharris.com or with any of your board members.

Till then,

Christl Mittendorfer
 2010 TLOMA President

Engaging Digital Natives

By Jerome Shore

The workplace is starting to fill-up with young people who have grown up in the information age. They have a wealth of know-how with tools that have the power to deliver an awesome increase in productivity. They are commonly known as millennials or, more appropriately, Digital Natives. Getting these kids working hard and happily with these tools is an emerging opportunity.

Hard and happily is commonly known as engaged. An engaged employee is well satisfied at work and is energized to do a good job. Energy goes to initiative, effort, discipline, attentiveness, patience, extra effort etc.; essentially the things sought out and measured by performance reviews. At the other extreme many employees are disengaged. They may have become dispirited over time or maybe their perception of work doesn't allow for being engaged. Essentially they do the minimum to keep their jobs, or less. Most employees are somewhere in the middle and lots of Organizational Development effort is aimed at moving the average toward engaged.

Digital Natives have grown up in the age of digital technology; personal computers, personal gaming, smartphones, Facebook, blogs, YouTube etc. etc. They could have been online 20,000 hours before their 20th birthday. They've grown up using multiple stimuli simultaneously to a much greater extent than earlier generations. Which means they developed capabilities older people don't have. It's easy for them to be an early adopter because when a new piece of digital technology is launched the learning curve for many Digital Natives is minimal, because it's just an upgrade from something else they've been using. While not everyone, under 30, is a fully formed Digital Native many are and a high percentage can use more new technology productively.

Alternately there are the Digital Immigrants, older, migrants to the digital world, always trying to catch up, typically with difficult learning curves, able to use fewer tools and less productivity. The same kinds of problems immigrants always had.

Here is a scene I've witnessed recently starring a Digital Native that makes the point. I'm sitting in a meeting. A senior partner in a law firm is talking. A young lawyer, a Digital Native, across the table is flailing away on his BlackBerry. The partner asks the Digital Native to listen up. The young man says, "I am. I'm taking notes."

For the most part the workplace of 2010 hasn't caught up to the way Digital Natives can work and so their engagement and productivity are limited. Here are five ideas to enhance their engagement.

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1. Digital Natives live in a much more open world. For example their Facebook pages might be a minute to minute update of what's up in their lives. As a result they tend to be less guarded while expecting openness from others. Take advantage of that by being more up front when you talk to them. They're used to it.

2. Give them the opportunity to fail more. They've learned to fail and fail again in the games they play and as they learned with hardware and software. Think Rubik's cube. A constant spinning exercise in trying and failing until success. They've done so much of that growing up it's comfortable.

3. Motivate them with new technology. They want to use and master the best and the smartest of new technology. Give it to them and find a way to challenge them at the same time to make it a great investment. Look for the win/win.

4. They've collaborated much more growing up than the previous generation. With the web they had the opportunity to do it face to face and with people they'll never meet. They have the know-how to do more with collaboration. Find the ways to challenge them to do so. Involve them in the search for challenges.

5. They definitely don't want to burn out the way they saw many of their parents do. They want work life harmony 24/7. Technology allows for that. You should also.

6. They love feedback because they've got so much of it all their lives from the tools they use and because communication is now so much more robust. Get them a mentor to collaborate about their progress.

Jerome Shore is the Managing Partner of The Coaching Clinic provides Executive Coaching, delivers workshops in the areas of Leadership, Marketing and Resilience, and developed the e-learning in The Online Coaching Clinic. He can be reached at coach@coachingclinic.com or 416-787-5555.

Payments Security And Savings

By John Kubacki

Payments can be a pain. They are necessary, both to keep our vendors happy and to preserve our good credit rating. But they are also a potential source of headache. As the number of accounts increases, so does the need to protect cheque stocks. Ensuring the correct pre-printed stock is in the printer also becomes a chore. And when it's time to sign a stack of cheques, partners can be seen running and hiding behind closed doors. And last but not least, the fear of fraud is always there.

Fraud is an increasing concern. It can be external to your firm, or sadly, many cases exist of internal fraud. These days, fraud criminals may start to re-focus their considerable energies, and imagination, on cheques because of better security in credit and debit cards, which are now protected by chips.

This article will look at ways to make your payments more secure, whether by cheque or by EFT. While security is paramount, it is also possible to streamline the payments process and thus save time and money. A future article will explore ways of saving money on processing payments.



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Payments Terms and Trends

Pre-printed cheques come from your supplier with your bank account information already pre-printed on the numbered cheques. The most basic is the manual cheque, often in a book. Computer generated cheques have been the continuous form variety, but are being replaced by laser cheques (8 ½ x 11).

The latest type of cheque is the MICR laser cheque, where the entire cheque, including the MICR coding at the bottom, is printed on blank security cheque paper as it is issued.

Positive Pay is a bank service. As soon as you run cheques, you send a list of them to the bank. The file you send the bank must meet their detailed specifications. Any cheque presented for your funds must match that list, or it is not cleared without your explicit approval.

Electronic Funds Transfer ("EFT") is a service where you send instructions to the bank, and it transfers funds to your payee. The file you send the bank must meet their specifications. EFT requires an additional separate step where you also have to send the payee the details of the payment (invoices paid or voucher detail.)

An integrated cheque-writing/payments function refers to financial applications having payables and cheque-writing functions included. They may or may not have EFT capability.

The stand alone payments application "bolts on" to the financial package quite easily. The stand alone system can often have better functions and security, because it focuses solely on the security and economy of payments, and because it has to justify its existence compared to the integrated function.

How to Improve Payments Security

Payments fraud can often be perpetrated internally, as economic pressures build, or greed sets in. Alternatively, the fraud is external, where perpetrators get access to your cheques, or hack into your EFT system.

Best accounting practices are not enough.

Security must be strong at the source in your office, and it must actually deter external tampering with your cheque. The following elements are recommended:

1. MICR Laser Cheques are an excellent first step to improving security. A pre-printed cheque is virtually a negotiable instrument. By eliminating them, you eliminate the risk of their falling into the wrong hands, at point of production, in transit, or even from your office storage.
2. A good payments program will provide additional approval level(s) for creating cheques or EFT payments. At minimum, access specifically to payments, whether in an integrated system or a stand alone, should be controlled by user ID and password. Some systems have additional elements, like magnetic cards or biometric scanning (fingerprints) to approve a cheque run or EFT batch. The benefit is both the additional security, and the opportunity for segregation of duties.
3. User permissions should be tailored to payments. A payments system should control, among other things, the right to re-print a cheque, the access of some users to only some accounts, and the right to manage bank account information. Many other permissions can enhance security.
4. A USB Key ("HASP") is a device that can protect access to payments. It must be present in a USB port for the payments system to function. When removed for security, it protects against unauthorized access.



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5. Security imprints, which are created on the cheque as it is printed by the payments software, are extremely effective in deterring alterations of your cheque. That is because they add more elements that need to be altered for the fraud to be successful.

Unprotected cheques are an invitation to fraud.

6. Digital signatures are being used more frequently for general cheques, as opposed to trust cheques. Therefore, they must be a special focus for security.

In addition to controlling access specifically to payments, the following security is advisable for any use of digital signatures:

- Encryption of the signatures so they can only be used within your payments system;
- Signature limits, so you can still manually sign cheques over a limit. The limits can also be used to allow one digital signature with one manual one.
- Separate signature approval (see #2, above). The person(s) authorized to approve the cheques/signing must intervene to proactively allow the signed cheques to be run, or EFT payments to be processed.

7. Cheque stock security features can play a pivotal role in security. Features such as chemical sensitivity, toner fusing, invisible markings, and micro-printing can help deter fraud, or identify an original in the case of fraud.

8. Positive Pay (see **Payments Terms and Trends** above) is a key way to protect yourself against fraud. By having the details of your cheques in the bank's clearing system, you can eliminate most fraud attempts. Your payments application should facilitate Positive Pay.

Fraud is growing and becoming more sophisticated. Protecting your firm by paying attention to payments security now will save you headaches in the future.

John Kubacki is with Paystation Inc. (www.paystation.ca). Formerly known as "Paymaster," this Canadian company has worked with banks, police, and our clients for over 50 years to prevent fraud and improve payments. It offers a full range of options, from manual Cheque Protectors to software for every size firm, and a full line of shredders. John can be reached at 905-849-5882 or john@kubacki.ca



Microsoft Exchange 2010 - A More Robust E-mail System

By Chris Childerhose

Microsoft Exchange 2010 has many new features that will allow firms to better manage mailbox size, retention and security to name just two of a myriad of new features.

The release of Exchange 2010 brings a more robust e-mail system and some new features that will appeal to many firms. The trend is towards storing more e-mail within a mailbox. With Exchange 2010 this can be handled directly on the server instead of the Outlook client.



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Some of the new features are detailed below:

No more PST files!

The Personal Archive (PST) is a secondary **mailbox** that is associated with a user's mailbox and thus stored in the mail server in Exchange 2010. It appears alongside the primary mailbox folders in Outlook, so users have direct access to e-mail within the archive just as they would their primary mailboxes. Users can drag e-mail from PST files into the Personal Archive to make them easier to access online. E-mail items from the mailbox can also be moved to the Personal Archive automatically using policies; this in turn reduces the mailbox size and improves application and network performance which will resonate with anyone with a large mailbox. Users can also search both their Archives and mailboxes in Outlook. Because the archive is server based, it can be open multiple places at once. The archive can be kept on less expensive storage such as a connected hard drive.

Legal Hold Preserves Mail for Litigation

A Legal Hold preserves deleted mailbox items and records changes made to mailbox items from the time the Legal Hold is placed on a mailbox.

Exchange 2010 enables you to immediately preserve users' deleted and edited mailbox items (including e-mail, appointments, and tasks) from both their mailboxes and Personal Archives. Legal Hold can be set on individual mailboxes or across the enterprise and can be set for a specific time period. Legal Hold also includes an option that automatically alerts users through Outlook 2010 that a hold has been placed on their mailboxes. This can be done silently if you do not want to alert a user they are subject to legal proceedings. This is useful information for lawyers to know in the event that litigation involves obtaining e-mail.

E-mail Security using Classifications

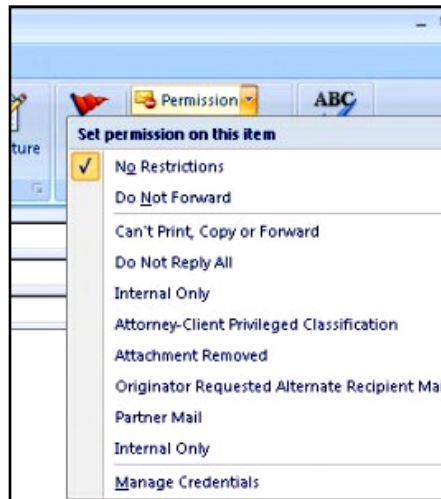


Figure 1 - Customized permissions in Exchange 2010

As a member of a law firm you might find it important to have all your client e-mail messages protected and archived for long term storage. Exchange 2010 simplifies and automates this process through a combination of new features.

E-mail Classifications

Using e-mail classifications which are completely customizable by the firm, you can classify certain e-mail as Client Privileged and that e-mail and any reply or further e-mail which is part of that thread will automatically be processed based on a rule created on the Exchange server; in this case to archive the e-mail into a Personal Archive. This automation ensures that all mail that is marked as Client Privileged is automatically archived and saved for a long term period without further user intervention.



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E-Mail classifications can be utilized in many other ways. With the new features offered by Exchange 2007 and further enhanced in Exchange 2010, the server is able to process classified e-mails with special directives. For example, if you want to send an e-mail which is meant for internal review only and do not want, under any circumstances, that e-mail to be forwarded or be able to leave your firm a classification of Internal Only can be assigned to it. When the Exchange server sees a request to forward the message or otherwise have it leave the firm it automatically drops the e-mail and notifies the sender that mail is for internal use and cannot be sent outside.

Active Directory Rights Management Services (ADRMS)

ADRMS can be used to protect your Office documents as well as e-mails. ADRMS will apply a security template to a document or e-mail which will prevent internal recipients of the e-mail or document from being able to reply, forward, copy, print or save the e-mail or document at the firm's discretion. This is just one example of capabilities and granularity that can be applied to e-mail and Office documents via ADRMS.

Requirements for Upgrade:

- Server that will support Windows Server 2008 x64 or Windows Server 2008 R2
- Exchange 2010
- Storage – Based on number of users and sizes of mailboxes expected

The Verdict

If you currently have an older version of Exchange Server (2003/2007) consider the upgrade to Microsoft Exchange 2010. There is an initial cost to the upgrade but the benefits the firm will gain in the future will be significant. We have only touched on the major features in this article.

Many of these new features should appeal to all firms as it will ease the administration and IT burden. We recommend that the installation be completed by an authorized Microsoft Certified Installer. Please contact us if you have further questions or would like more information on this product.

Chris Childerhose is a Consultant with Triella, a technology consulting company specializing in providing technology audits, planning advice, project management and other CIO-related services to small and medium sized firms. Chris can be reached at cchilderhose@triella.com or 647.426.1004. Follow our blog at www.triella.com. Triella is a VMware Professional Partner, Microsoft Certified Partner, BlackBerry Alliance Partner, Authorized Worldox Reseller and an AVG Gold Reseller.

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Cloud Computing And The Law Office

By Ryan Penn

IT Security Raising the Bar

The demands on professionals working within small and medium firms have become more difficult as clients expect service and expertise similar to a large professional services firm, at less cost. This has affected how all firms operate their offices as well. With the use of leading edge office technology small and mid-sized firms have been able to gain efficiencies to be more able to compete. One technology concept in the current discussion is Cloud Computing.

Is it right for your firm and will it offer a competitive edge?

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You may be familiar with Cloud Computing (Cloud) which is found in the public cloud such as Hotmail, Google Apps, etc. The private cloud over internal networks is what we will be focusing on within this article. This Cloud is used to securely provide firms the ability to share, store and manage information. In the Cloud there are two basic management tools; Software as a Service (SaaS) and Infrastructure as a Service (IaaS). Software vendors are rapidly introducing hosted software and data management options to help offset the cost of internal management of software. One can sign up for monthly subscription fees and access their software over a secured internet connection or portal. This is SaaS. Infrastructure as a Service provides all the Infrastructure commonly found within the customers office from servers, networks, back-up and security management (anti-virus/spam/malware) and desktop management from an off site hosted environment where once again can eliminate the capital costs all together and the related management and subscribe for what they need on a monthly basis. This "service as needed" is like other resources such as electricity or phone services they purchase to run their office.

The two most often asked questions about Cloud Computing by professionals are:

- 1) How can I be sure that there is security in place to protect my very important information and,
- 2) If my data is all kept offsite and not in my office, how can I be sure it is safe?

While we will attempt to answer these important questions, it is important first to understand your current environment, and then consider Cloud Computing from this context, by referring the questions, and things to consider below.

For proper security within your current environment, it all begins with documented and agreed to IT Security Standards and Guidelines to assist users and systems custodians to meet their IT security responsibilities. IT managers or VARs must implement security plans, but also need to run regular checks and make sure the standards are in place. They should supply these checks, to a Committee of Management for internal audit on a regular basis.

Risk Management is an essential aspect of Security Management. Breaches need to be identified, analyzed, evaluated, treated, monitored and communicated as to the associated risks to minimize losses.

Operations and Back-up management sets the standard for trustworthy and reliable IT Security. Is there a minimum level of back up together with an accurate and complete record of back up copies and documentation of restoration procedures? Is there an off site remote location for back up files that can escape damage of disaster at main site?


Protection against malicious software such as viruses /spam/malware must be in place within the firm's network, servers and also within house desktops and mobile devices.

IT management must have a Disaster Recovery and Business Continuity plan in place including all necessary data and software back up and recovery arrangements.

Do you operate securely and have mindful management responsible for the importance of Risk Management and Restoration Procedures? Without this, client services are compromised and the sought after competitive advantages will be lost. If you have all this in place, the question of security within the Cloud IaaS option becomes a matter of degree. If you are not confident that the disciplines are in place surrounding your current security then the Cloud option will be a quick fix.

Cloud Infrastructure as a service in most cases will in fact have superior security practices and technology in place than the best of small to mid-sized professional firms. In fact, they have built their infrastructure to match the countries' Chartered Banks. Economies of scale allows them to spend millions and you only pay for the small portion you use.






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 - * Redundant server and fail-over capability is fundamental to the environment and ensures no lost data or interruption
 - * Off site back up, both electronically and hard copy are freely available.
- Firewall and Malicious Software Detection should be of Enterprise caliber and exceed your current levels of security. Inquire about the characteristics and robustness of these features.
- Back up program levels exceed SMB internal processes. The recovery activities are documented and reliable.
- Cloud IaaS has a built in Business Continuity program should your office be out of commission. The Data Center is unaffected by most disaster and will continue to provide service to your workforce from anywhere in the world with a secured Virtual Private Network (VPN) for the remote access required. Question what security features are included in the VPN. Can your Cloud IaaS quickly access protocols and procedures to react to your need to be up in running instantaneously during disasters at your office(s)?

The question really is not, is your data safe within the IaaS providers environment within the Cloud. The question really should be, do you currently have anywhere near the security in place within your current Infrastructure. It is seldom that the small to medium firms have the disciplines, the knowledge or willingness to spend for Enterprise security that is in place by IaaS providers.

Recognize the importance of security and the role it plays in providing a competitive advantage in allowing you to compete in your profession. Anything less will, in time, leave you behind. The private Cloud and managed services provides better security features and raises the bar for professions.

*This is one in a series of articles written by Ryan Penn, the President and GM of THINDESK INC, an **Infrastructure as a Service** provider operating within a private cloud network offered to the Law and other professions from a Toronto Tier 3 Data Center. Mr. Penn also oversees Security Audits for clients assessing their current IT environment. www.thindesk.com ; info@thindesk.com ; 416-849-1276*

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Are You Building A Healthy Wealth Portfolio?

Part 3 - Allocating Your Assets

By Magid Girgis, RHU

Recently, during an introductory client meeting, I met with a frustrated couple. I was greeted with a stack of file folders. The clients had money at several different financial institutions. They spoke about all the different advisors they had met with over the years.

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They complained about the different strategies that had been used. They expressed their disappointment in the portfolios' poor performance. They finally admitted they really did not understand all the kinds of investments they owned.

In Part 2, I introduced *Asset Allocation* and *Diversification*. Let's examine these concepts further. Asset Allocation and Diversification are processes used to divide an investment portfolio into multiple types of investments or assets. On the surface, they appear to do the same thing – spread out the risk. But they do it differently. Let's see how.

Investments or assets are categorized into classes. There are generally 3 asset classes that we use in portfolio management.

Cash Equivalents	Savings Accounts T-Bills (Money Market) Short-term GICs (less than one year)
Fixed Income	GICs Accumulation Annuities Government Bonds Investment Grade Corporate Bonds High Yield Bonds
Equity	Canadian Stocks US Stocks International and Global Stocks

Each class has a role to play in the portfolio. Cash Equivalents are the safety net of the portfolio. They provide an investor with accessibility to cash when the need arises. Fixed Income assets are the regular income earners. Guaranteed Investments and Bonds return guaranteed monthly or annual income to their holders. The Equity assets are the riskiest part of the portfolio. However, they historically offer the highest returns over the long term.

Asset Allocation allows you to spread the risk throughout different types of asset classes. An example of asset allocation in a portfolio could look like this:

5% Cash – 35% Fixed Income – 60% Equity

Diversification allows an investor to spread the risk further by choosing different categories within the same class. Provided in the chart below are some category examples.

Category	Example
Industry / Sector	High Tech, Natural Resources, Emerging Markets, US Small Cap
Geography	Canadian, US, International
Management Style	Value vs. Growth
Maturity	1 yr GIC vs. 5 yr GIC
Credit Risk	Balance Sheet of Company A vs. Company B



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Going back to my original allocation example (5% Cash – 35% Fixed Income – 60% Equity), look below at an example of a diversified portfolio.

Asset Class	Diversified Portfolio
Cash - 5%	2% - TFSA (tax-free savings account) 3% - Money Market Fund
Fixed Income - 35%	5% - Canadian Bond Fund 15% - Canadian Corporate Bond Fund 15% - Canadian Mortgage Fund
Equity - 60%	15% - Canadian Large-Cap Fund 10% - Canadian Small-Cap Fund 10% - Canadian Resources Fund 15% - US Large-Cap Fund 10% - Foreign Emerging Markets Fund

The chart above is an example and not a generic template. Each one of you will need to participate in a proper financial review before you can determine how to allocate and diversify your investment portfolio. Let me say one important thing. Diversified portfolios need to change over time. In my opinion, there is no portfolio that can remain constant.

As we get older and need the money, the percentage held in each of the classes must change.

Do you remember the couple that I met with? This is what we talked about in our first meeting and what we will continue to talk about over the years. In the next part, I will review the relationship between time and risk.

Magid Girgis, RHU is a Sun Life Advisor in the Greater Toronto Area. The author welcomes any feedback or questions you may have. For more information about what is discussed in this article or on other financial matters, Magid can be contacted by telephone at (905) 886-2200 ext. 2245 or by e-mail: magid.girgis@sunlife.com. You can also follow Magid on his blog – mgirgis.wordpress.com and on Twitter – [magstergee](https://twitter.com/magstergee).



The War On Talent Heats Up

By Bob Woodcock

In a recent study *Right Management* found that while uncertainty in the job market persists, 52% of employees report that they were approached by another employer with a possible job offer in the past 12 months. The firm analyzed responses from more than 3000 individuals throughout North America via an online poll conducted with LinkedIn.

The latest reports suggest that there is an increasing movement in the job market. One in five companies are anticipating an increase in new hires as they close out 2010 and get ready to implement business plans in 2011. Back to business in the “new normal” means a hypercompetitive market for available talent. *“Everyone is pressing for an edge” claims Owen Sullivan, Chief Executive Officer at Right Management.* That means you should be prepared for other firms to poach your best talent creating the potential for significant gaps in performance. Your continued success as a manager is tied to the base of talent you have available to you.



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If you aren't already, the current landscape dictates that you should be working with every member of your team to create a development plan, starting with your top performers. This is the group that will be most coveted by competitors and that are most visible to other employers in different markets to yours. If you haven't had a career oriented discussion with this group in the past 12 months you run the risk of losing them. These conversations will help you understand the goals and aspirations of each member of your team and how they may align with the business objectives of your firm.

Talent management strategies include regular performance reviews. As managers we know that these reviews are good for the employee and the organization and yet they are often viewed as being a source of personal frustration and aggravation. The annual review process for many managers is a cumbersome way to deliver feedback. Who has the time over the course of the year to document to the depth of detail that is required to complete the form provided by HR? Why should you invest your time as a manager to complete a form that isn't going to be reviewed again until next year?

Ken Blanchard, *Leadership and the One Minute Manager*, coined the phrase "seagull management". They fly in, make a lot of noise, dump on everyone and then fly out. Organizations that don't focus on performance management fundamentals have more than their fair share of seagull managers. A recent Towers Watson global workforce study found the following;

- 38 % think their leaders have a sincere interest in their well-being.
- 47 % think their leaders are trustworthy.
- 42 % think their leaders inspire and engage them.
- 59 % think their direct manager is effective at managing, but 53 percent question whether managers have time for the people aspects of the job.
- 61 % question how well managers deal with poor performers.

The truth is that performance management done well is not an onerous task that takes place once a year. Considering the current state of affairs, talent leaders may question why more managers don't address these issues head on, but it usually comes down to a matter of the time and effort required to have regularly scheduled check in conversations. While the fundamentals of performance management are not complex, they are not necessarily easy, and they do take time. Finding 30 minutes on a weekly basis for one-on-one meetings with several direct reports can seem like a scheduling nightmare, but the reality is it saves time in the end by reducing the amount of time wasted dealing with substandard performance.

An employee may join an organization because of its prestige and reputation, but it is the relationship with their manager that determines how long they stay and how productive they are while they are with you. There are four characteristics to a successful performance management routine, simplicity, frequent interaction, focus on the future and self tracking. If you follow the basic routine established by Marcus Buckingham and Curt Coffman in *First Break All The Rules* and apply it in your own style you will give yourself the best chance possible to define the right outcomes, focus on each team members strengths and help each of them find the right fit within the organization. Getting employees to articulate what their perception of strengths allows you to address gaps in comparison to the behavioural data acquired by psychometric assessments.

The basic routine begins with a strengths interview. Typically you would have this discussion soon after an employee has started and then at the beginning of each year. You will spend about an hour with each of them to learn about their strengths, goals and needs as they perceive them. If you want to help someone be productive you have to know where he or she is starting from. Whatever is said, even if you disagree, jot down the answers to the following questions;

1. What did you enjoy most about your previous work experience? What brought you here? What keeps you here?
2. What do you think your strengths are? (skills, knowledge, talent)
3. What about your weaknesses?

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4. What are your goals for your current role? (ask for scores and timelines)
5. How often do you like to meet with me to discuss your progress? Are you the kind of person that will tell me how you're feeling or will I have to ask?
6. Do you have any personal goals or commitments that you would like to tell me about?
7. What is the best praise you ever received? What made it so good?
8. Have you had any productive partnerships or mentors? Why do you think these relationships worked so well for you?
9. What are your future growth goals, your career goals? Are there any particular skills you want to learn? Are there some specific challenges you want to experience? How can I help?
10. Is there anything else you want to talk about that might help us work well together? I suggest if you have behavioural data with regard to each team member, share it with them. It will assist both you and your team member make an action plan and achieve their goals.

During the course of the year and on the timeline established during the strengths interview you will have ongoing performance planning meetings. To help the team member prepare them to write down the answers to the following questions before each meeting:

- A. **What actions have you taken?** Here you will learn the details of performance over the last period of time between check ins. You will want them to include scores, rankings, ratings and timelines.
- B. **What discoveries have you made?** It is important that each member of the team tracks these insights for themselves.
- C. **What partnerships have you built?** This could be new relationships or strengthening old ones. It is up to them to decide but whatever it is, she/he must take responsibility for building their own network inside and outside the company
- D. **What is your main focus?** Establish the primary goal(s) for the next period of time.
- E. **What new discoveries are you planning?** What is she/he planning to learn over the next 3 months?
- F. **What new partnerships are you hoping to build?** How are they planning to grow their network prior to your next meeting?

Understanding the answers to these questions and applying what you've learned in a way that matches the behavioural attributes of the people on your team will serve you well as this war on talent heats up. You should find yourself having a minimum of four career oriented discussions over the course of the year if you follow the plan created by Buckingham and Coffman that I've shared with you here. What's the best way to retain your key talent? Understand what they want and find a way to help them achieve their goals!

Bob Woodcock, Managing Principal, Predictive Success Corporation. Bob has assisted many organizations with implementing timely solutions to address their people challenges. "As a leader or manager it is critical that we understand how our own behaviour impacts the members of our team and others within the organization in order to get the best out of our people." To find out more about how to better understand, motivate and develop the people you manage and find ways to develop more effective relationships with other members of the firm, contact Bob Woodcock at bobw@predictivesuccess.com, Bus: (905) 430-9788 x204, Cell: (647) 746-4678.

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