

November 2012

TLOMA Today

A publication of The Law Office Management Association

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Thursday, November 15, 2012
- **Holiday Networking Event**
Friday, November 30, 2012

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2012 TLOMA
President

By: Karen Gerhardt

PRESIDENT'S MESSAGE

BREAKING NEWS!! We did it! The new website was launched just before the conference!

As promised the website has been revamped. It's fresher, more user-friendly and progressive.

Dean McCarthy, Technology SIG Leader and Calvin MacLeod of Cubicle Fugitive, assisted delegates at logging into the website at the 2012 Annual Conference held at Deerhurst. If anyone experiences any difficulties in logging in once they have returned to their offices, please contact Calvin at kalvin.mcleod@cubiclefugitive.com or Liz Barrington at lbarrington@tloma.com.

We hope you enjoy and utilize the new website. Get to know the nuances and the new features of the website. I encourage you to provide us with your feedback.

Once again, I want to extend the Board's sincere "THANK YOU" and a job well done to the Website Committee at building the TLOMA website in conjunction with our Business Partner, Cubicle Fugitive. Everyone worked so very hard to get the website out to our members in time for the Conference.

The Annual Conference took place from October 24 through to October 27 at Deerhurst Resort. We had 100 delegates attend the conference this year and 19 delegates attended the conference for the very first time.

Attending the conference provides unique opportunities not only to further your education and listen to great speakers like Arlene Dickinson and Mike Lipton and their words of wisdom, but there are also great networking opportunities; the chance to develop rapport and relationships with your fellow colleagues; to meet Business Partners; and to meet and greet delegates from different locales as well. This year, we were fortunate to have Steve Wingert, 2012 President of ALA, Barbara Fisher, ALA Ottawa Chapter and Jorllette Navarro from the Dominican Republic attend our conference.

At this time, I also want to extend a heartfelt "THANK YOU" to our Business Partners for their generous contributions to the TLOMA Conference year after year. Without their continued support, we would not be able to provide our membership with inspirational speakers, a different and beautiful venue year after year, and chance to connect with our colleagues.

I also want to extend a sincere 'THANK YOU' to our Conference Committee members for putting together a phenomenal conference. They have worked tirelessly to put this conference together. As with all our committees, these are volunteer positions and it's a huge endeavor year after year to come up with something different to keep our members motivated to attend. They must be creative and put in an inordinate number of spare hours to have the conference run smoothly. Great job TEAM CONFERENCE!!!

PRESIDENT'S MESSAGE CONTINUED....

Also, don't forget to put Friday, November 30 in your calendar. This is our final Networking Social Event. Please check the website for details.

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



Bernard Quilty has been a member of TLOMA since 2007

By: Bernard Quilty

VOLUNTEERING WITH TLOMA - A Rewarding Experience

My name is Bernard Quilty and I have been an active member of TLOMA since 2007. Some of you may remember me as a Technical Support Analyst with Canterbury and then with Lighthouse Legal Accounting Software. I was very delighted to become a member of TLOMA and since then I have developed wonderful personal and professional relationships with former clients and with other members that I met back in 2007. The networking and professional development opportunities that have been available to me thus far have benefited me greatly.

In the last couple of years I have had the opportunity to volunteer with our Association, namely at the Conference in 2011 (introducing a speaker), and on the Board of Directors Nominating Committee. I was honoured and excited to be asked to



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introduce one of the presenters at our Educational Conference last year. This experience gave me the opportunity to showcase my public speaking skills to the delegates who attended the session (as well as my singing!) and it was well received both by the attendees and the presenter. For the past two years I have had the pleasure of sitting on the Nominating Committee, and this year I was elected Chair. Being a member of this committee has given me a chance to get to know other members of TLOMA, particularly those on the Board. It also gave me a great sense of accomplishment to be part of a team and to interact with our potential Board candidates.

I am looking forward to more volunteering with TLOMA in the coming years ahead. I am particularly interested in volunteering for the Conference Committee. Beyond that I hope to someday become a member of the Board of Directors, as I feel that my enthusiasm and scope of experience would be an asset to the Board. I encourage each and every member of TLOMA to volunteer in any capacity they feel comfortable with, whether it be handing out passport booklets at a Conference Trade Show or sitting on the Board of Directors. You will have the opportunity to interact with many of your colleagues in the industry, build wonderful, long lasting relationships with them, and feel that you are an integral part of our fantastic Association that is TLOMA!

Bernard is the Supervisor of Operational Accounting at Davis LLP in Toronto and can be reached via telephone at 416.941.5407, or via email at bquilty@davis.ca

24th Annual TLOMA Conference

October 24-27, 2012

Deerhurst Resort
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David Hyde spoke at a Facilities SIG on Front Line Security in September 2012

By: David Hyde

EFFECTIVE LOBBY AND RECEPTION AREA SECURITY: A LAW FIRM’S “BEST DEFENCE”

Introduction

The lobby and main reception area of any law practice plays a central role in safeguarding the firm, its employees and clients, from a growing array of potential threats. Increasingly resourceful criminals, expanded workplace violence laws and heightened data privacy considerations

are just some of the many factors driving the need for professional services firms to prioritize front office security.

Establishing an appropriate security posture at the main reception area is a matter of balancing the need for an open, welcoming environment with the need for effective, visible security. It is no longer acceptable to think of security as something implemented once and then forgotten. As new risk exposures emerge, law practices need to be proactive in protecting the front line of their business.

The Protection Context

The first step in assessing and/or implementing any office security program is to consider the “protection context”; namely - (1) the business profile; (2) legal

requirements; (3) the building profile; and (4) area characteristics.

An initial priority when setting up or reviewing reception area security is to look closely at the nature and character of your particular business. What type of law do you practice? How many employees work in your office? Do any of your employees attract heightened attention from the public or in the media? What types of activities are conducted on your premises (i.e., are there sub-tenancies, are mediations held on site, do you attract “walk-up” clientele)? What types of clients and guests visit your office (i.e., do you serve any “high profile” or potentially controversial

A number of legal requirements must be observed in setting up reception and lobby area security. Under the Occupiers Liability Act, the firm has a duty to take such care as is reasonable to keep the premises safe for all entrants.

clients)? Do you deal with particularly sensitive matters or “high value” transactions within your offices (i.e., what is the potential for your business activities to attract attention from aggrieved parties or even potential infiltrators)?

A number of legal requirements must be observed in setting up reception and lobby area security. Under the [Occupiers Liability Act](#), the firm has a duty to take such care as is reasonable to keep the premises safe for all entrants. The standards identified in the [Accessibility for Ontarians with Disabilities Act](#) must be observed, including the [Integrated Accessibility Standards](#) regulation, the [Accessibility Standards for Customer Service](#) regulation and the future [Built Environment Standard](#).

The design and function of the reception desk and front lobby area must also incorporate safe workplace standards under the auspices of the [Act to Amend the Occupational Health and Safety Act with Respect to Violence and Harassment in the Workplace](#). From a security perspective, compliance with privacy legislation (i.e., the [Personal Information Protection and Electronic Documents Act](#) or PIPEDA),

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is a key requirement, particularly with reference to video surveillance systems and the protection of company information/data. Does your front office security program comply with these and other relevant legal standards?

For law practices operating within multi-tenanted buildings, it is also important to consider the characteristics of the building and the location of your tenancy. Are security guards stationed in the building lobby or assigned to patrol the building? What time are the main elevators secured? Can people access your floor via an unprotected freight elevator or stairwell? Can people access your floor directly from an underground parking area? Are there any tenancies in your building that could attract negative attention (i.e., a Government Office, consulate or religious institution)? How secure is the building overall?



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The final point to consider in establishing your protection context is the area profile. Is your building located in the downtown core or an outlying area? Is your building connected to the PATH system or adjacent to a major transit station? What are the area demographics

(i.e., what other businesses are in the area, are there any residential uses)? Which area factors may have an impact on the overall security of your premises?

The answers to the preceding questions will provide a necessary backdrop against which to design and implement your reception and lobby area security program.

What are we protecting against?

The main security and crime threats to law practices can be broken into the four categories of: (1) opportunistic crime (i.e., laptop/property theft); (2) subversive crime (i.e., data theft/destruction); (3) violent crime (i.e., assault/threats); and

(4) emergency incidents (i.e., fire/bomb threat/evacuation).

Opportunistic criminals look for easy opportunities to steal valuable business items such as laptops and projectors or valuable personal items such as wallets and purses. This type of criminal tends to make decisions to commit crime based on a calculation of "risk versus reward" (i.e., a cost-benefit analysis). Subversive criminals tend to be more sophisticated and often target information or data, which they steal, copy or otherwise interfere with. The subversive criminal is much rarer than the opportunistic criminal, but will often go to greater lengths to perform advance planning on potential targets in order to circumvent defences.

Violent crime comes in various forms and guises and while relatively rare in the law practice setting, can be both unpredictable and highly consequential to the victim(s). Violent crime originating

EFFECTIVE LOBBY AND RECEPTION AREA SECURITY: A LAW FIRM'S "BEST DEFENCE" CONTINUED....

externally could come in the form of an angry client/litigant or a street criminal. Violent crime originating internally could come in the form of a disgruntled employee or former intimate partner. Recently expanded legislation in Ontario compels Provincially-regulated employers to take a number of active steps in identifying, mitigating and managing the risk of violence in the workplace and this must remain a priority area in securing the reception desk and front lobby.

Emergency incidents can be natural (i.e., severe weather) or man-made (i.e., bomb threat). For law practices with offices in multi-tenanted buildings it is important that steps be taken to align emergency and critical incident procedures with those of the landlord. An assessment should be conducted to identify those emergency and critical incidents most likely to occur in the building and steps should then be taken to develop the relevant procedures and train reception staff to respond appropriately.

Identifying the opportunistic, subversive and violent crime threats, as well as the emergency incidents most likely to impact your office will help to establish the "security risk profile" for your practice. This information will assist in setting up or strengthening your lobby area and reception security program in a manner that addresses the specific security risks faced by the firm.

Reception Desk and Lobby Area Security Priorities

Any office security program is comprised of four interrelated components, each of which should be prioritized equally and integrated to achieve maximum effect:

- Physical security (e.g., design, barriers, locked doors, secure cash containers)

- Technical security (e.g., electronic access control, video surveillance, duress alarms)
- Procedural security (e.g., security procedures, emergency protocols)
- Personnel security (e.g., training of staff in critical incident response and security awareness)

1. Physical security priorities

Physical security considerations in the reception area begin with visibility into and out of the lobby and reception desk area. Glass panel entrance doors into the office are usually preferred as they provide a clear "line-of-sight" to reception desk staff who are able to see people approaching/leaving. Another advantage of a glass-fronted entrance is that a potential criminal passing by the office can see in and will recognize that there is a level of guardianship (i.e., reception staff), which acts as a strong crime deterrent.

The positioning of the reception desk is another physical security priority. Ideally, the reception desk should be located directly in front of the main entrance

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into the office. This desk position allows reception staff maximum time to monitor people approaching the office and also ensures that passing opportunistic criminals can clearly see that reception staff are present.

The design of the reception desk is also an important consideration. The height and depth of the desk should create physical separation between reception staff and people on the other side of the desk. The floor behind the desk should be raised or other steps should be taken to ensure that



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reception staff are clearly visible above the front counter. Thought should also go into designing and/or nominating a "safe area" for reception staff to retreat to if they fear for their safety. A lockable door behind the reception desk leading directly into the law office is the best approach and offers optimum staff safety.

Monitoring and controlling access into the office is a key security function of reception staff. All those entering the office lobby area should be acknowledged and spoken to at the earliest possible opportunity. Anyone who doesn't have legitimate business with the firm should not be permitted to use the firm's (public) washrooms or otherwise remain in the

The implementation of video surveillance in a law office should be approached with care and attention. Cameras should only be installed in communal areas where there is no expectation of privacy.

office lobby. Many law firms are vulnerable to unauthorized entry via the reception desk area into inner office areas. While human guardianship in the form of active, engaged reception desk personnel offers a reasonable level of access control, the most effective means of restricting unauthorized access into inner office areas is through the addition of lockable (glass) doors connected to an electronic access control system.

2. Technical (electronic) security priorities
In many law offices, traditional key-operated mechanical locks have been replaced by electronic locking devices interfaced with an electronic access control

and alarm monitoring (ACAM) system. An ACAM system is highly recommended for use in law offices and offers many benefits over mechanical locking systems, including:

- eliminates the risk of unauthorized duplication of keys
- lost or stolen access cards can be immediately deleted from the system
- ability to track access patterns, enhancing oversight and accountability

Another benefit of an electronic ACAM system is that it can facilitate "one touch" lockdown capability from the reception desk. In this scenario, the electronic locks on the main entrance into the lobby area can remain unlocked during operating hours but in the event of an imminent threat, an immediate lockdown can be initiated from behind the reception desk with the push of a button.

Video surveillance cameras are increasingly deployed within front lobby areas as an additional layer of security. At the present time, there is no research showing that video cameras "prevent" crime in office environments but there are still many good reasons to install cameras in reception and office lobby areas. Some of the benefits of cameras include:

- act as reassurance to reception desk staff that lobby activities are under observation
- may act as a deterrent to some forms of crime
- may aid in investigation or criminal prosecution in the event of a crime or security incident in the office

The implementation of video surveillance in a law office should be approached with care and attention. Cameras should only be installed in communal areas where there is no expectation of privacy. Clear signage advising that video surveillance is in effect must be posted at/near the main office entrance to comply with legal privacy requirements.

EFFECTIVE LOBBY AND RECEPTION AREA SECURITY: A LAW FIRM'S "BEST DEFENCE" CONTINUED....

Video recording equipment should be well protected and access to this equipment must be restricted to authorized employees only.

Another increasingly common electronic security measure is a reception desk duress alarm. This type of alarm is typically activated in the event that reception staff require security assistance. Most duress alarms are silent at the point of activation and send a signal to a response agent. In larger office buildings, there is tremendous value in having building security as the primary response agent. Where this is not possible, the duress alarm should transmit a visual and audible signal to several internal response agents who can provide immediate support and assistance (in line with operational procedures).

3. Procedural security priorities

Implementing policies and procedures that are tailored specifically to the security environment at hand can go a long way in keeping reception areas secure. All law practices should have a strictly enforced Visitor Access Policy. All visitors, guests and contractors coming on to the premises should be validated and required to sign-in. The old-fashioned "Visitor Sign-In Book" is vulnerable as it exposes the names of previous visitors identified in the book.

The Visitor Sign-In Protocol can be as simple as the reception staff recording the name of the visitor and the person they are visiting, as well as "time in" and "time out". Heightened visitor access control can involve checking the visitor's personal identification and having the visitor sign a form that may contain Visitor Rules. In either case, it is highly recommended that all visitors, guests and contractors entering past the reception desk be issued a numbered Visitor ID Badge which must be worn at all times while on the premises.

Safe work procedures are also a priority at the reception desk given the fact that this location is the first point of contact for anyone visiting the firm. Under occupational health and safety legislation in Ontario, the employer must conduct a workplace violence risk assessment, develop a workplace violence prevention and intervention policy and program, and provide instruction and guidance on violence prevention to employees. The reception and front lobby area should be a priority in conducting each step of the process.

The violence prevention program should incorporate critical incident response procedures, including steps to deal with disgruntled and/or hostile individuals and respond to "active threats" (i.e., a person in the vicinity of the office with a weapon). Procedures addressing more traditional emergency incidents such as fire, bomb threat and utility failure should also be in place. In the case of bomb threats, a Bomb Threat Checklist should be on hand at the reception desk in the event of a telephone threat. An excellent form has been developed by the RCMP and can be found at:

<http://www.rcmp-grc.gc.ca/tops-opst/cbdc-ccdb/telephone-procedure.pdf>

A distinction should be made within critical incident response procedures between "evacuation" and "shelter-in-place". While evacuation is the appropriate course of action in most fire situations, for example, it is often the case that sheltering in place (i.e., ordering an office lockdown) is a more appropriate step when faced with an active threat situation (e.g., an armed individual suspected to be somewhere in a high-rise office building).

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4. Personnel security priorities

The lobby and reception area is the front line when it comes to crime prevention and security at any law office. Employees assigned to work at reception need to be trained in security awareness, threat recognition and critical incident response practices and procedures.

Reception staff training should be customized to address the specific risks faced at the law firm in question. To be effective, this training should be delivered by subject matter professionals qualified in this particular type of instruction.

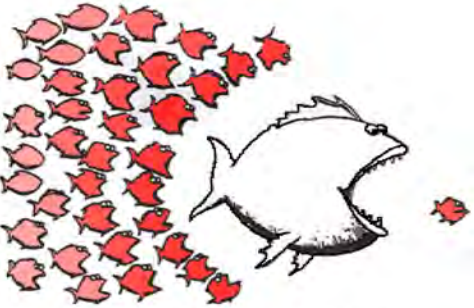

In addition to basic online violence prevention training (which all office employees should receive) and the more advanced, customized instruction for reception staff as described in the paragraph above, there is much benefit to be gained in running critical incident response exercises or simulations. Holding this type of "dry run" exercise is the best way to prepare reception desk staff to deal with a critical incident at your office.

Conclusion

Creating a fully-functioning office security program involves taking the individual program components - (1) physical, (2) technical, (3) procedural and (4) personnel security - and building them into a series of overlapping countermeasures that complement each other. Each part of the program should integrate with the other parts to increase the level of protection to clients, visitors and staff. Further, it should send a clear message to anyone with malicious intentions that their activities will be quickly noticed and their presence is not welcome.

David Hyde, M.Sc., CPC is owner and principal consultant of David Hyde and Associates, a national security and crime prevention consulting company specializing in commercial and business security. David has spent 23 years in security management and was National Security Director for The Cadillac Fairview Corporation between 2004-2010. He holds a M.Sc. in Security & Risk Management from the Univ. of Leicester and is a graduate of the Wharton School's Security Executive Development Program.

The lobby and reception area is the front line when it comes to crime prevention and security at any law office. Employees assigned to work at reception need to be trained in security awareness, threat recognition and critical incident response practices and procedures.



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By: Paul Kuttner

SUCCESSION PLANNING

WHY IS TRANSITIONING CLIENTS SO VERY HARD TO DO?

In the sixties, the Walker Brothers crooned, '...breakin' up is so very hard to do.....'

Why is transitioning clients so very hard to do today?

Succession planning is not about gold watches, diminishing status and value or brushing aside years of contribution. Succession is about long term profitable sustainability for a law firm. Attracting and retaining talented lawyers can have grave consequences for firms that fail to develop a succession strategy. Sometimes intervention facilitated by an outsider provides a window to start the conversation.

There May Be A Few Really Good Reasons

- Senior partners don't want to forfeit current compensation by transitioning client work;
- Senior partners don't want to diminish their status by transitioning client work;
- Firms have not methodically institutionalized clients over the years.

Phased Changeover Plans and File Transition

Every well structured plan is based on answers to relevant questions. Sometimes questions that need to be addressed may

not be apparent or be so obvious that they are overlooked. When we interact with a firm on client transition, these are some starter questions that generate conversation:

- **What is the immediacy of the issue?**

Unfortunately, succession planning is one of those preemptive projects that many lawyers feel they simply don't have time to undertake, are unwilling to initiate; feel will offend senior partners or simply hope that it will be taken care of in time. Denial, for a dozen real or imagined reasons is the major blocker. The problem is, what you cannot see over the horizon today will certainly complicate your life tomorrow. And you really don't want to deal with succession in a crisis.

- **Phased change over timing**

How lucky you are if no-one at your firm is a stone's throw away from retirement. Now is the time to set up a partners meeting to start the conversation - but to prevent an unproductive free-for-all, you need to present a discussion starting point and structure the agenda to focus it as a strategic business matter. At all times reinforce the fact that this is a good business practice and not a personal vendetta. Because there will be a number of points of view, use this discussion as the basis of refining a best practices approach for your firm with a target date for its adoption. Establish a start and end date based on a thorough analysis of the practice to be transitioned.

- **What roadblocks, real or emotional can senior partners create to stall change?**

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- **What are the compensation wants and needs of the retiring equity partner while transitioning clients?**

This can be a real sticking point or a non-issue, depending on your sense of mutual fairness and creativity.

- **What are the phased change-over program risks?**

Any business manager would ask this question.

- **That's great theory, but what about reality?**

So much will unfold once you get the conversation started. Depending on personalities, you might hit a brick wall at the first turn. Interestingly, such an encounter with cold concrete will test the managing partner's leadership capabilities. File transition should not be accomplished by a sweep of the magic gavel in secret. You should have reasonable, open and empathetic dialogue. And manage all pushback appropriately. Yes, '....breakin' up is so very hard to do.....'

Get started. Get help if you need it. If you are an aspiring leader, demonstrate leadership by getting transition on the firm's agenda. It's not personal. It's just a very good business practice.

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OFFICE 2010 MIGRATION – TRAINING & SUPPORT SUCCESS

Since the release of Windows 7 and Office 2007, CTD has been involved in several successful Office 2007/2010 projects with many Canadian firms, from large to small. CTD specialists have taken part in a variety of functions including project planning, application testing, training and floor support. The projects have included migrations from 2003 to Office 2007 and 2010. All firms rolled out the new Office applications with Windows 7, document management systems and a variety of template and numbering solutions. Training was mandatory for all support staff and all firms went with classroom sessions. Lawyer training was more varied and included everything from classroom to demo to at-the-desk. Although each firm handled projects differently, each paid special attention to system prep, staff orientation and training. What follows is a look at the steps taken, ensuring success in all projects.

Office 2007/2010 Introduction

Prudently, all firms offered some form of pre-rollout introduction to the new Ribbon environment. The main focus was to give users a preliminary look at Microsoft® Office's ribbon, putting users at ease when training started. New features such as Tabs, the Quick Access Toolbar (or QAT), Live Preview, etc. were emphasized to show ease of use. Users found it reassuring to know – some of the best old features were unchanged – like many keyboard shortcuts giving users a sense of confidence and decreased anxieties about the transition.

On-line training

On-line training sessions were offered to both staff and professional levels. Sessions were both specific in content and could be completed in a minimal amount of time.



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A session that could be done during a quick break was much more effective and efficient in contrast to something requiring more scheduling of the user's time. Two of the firms made the on-line sessions mandatory at a staff level. One of the firms strongly recommended these sessions—making them almost mandatory for their lawyers. The majority of lawyers participated, and as a result, the transition to the new software was easier (for them.)

Town hall sessions

Town hall sessions were also used to keep lawyers and staff informed, and introduce the new environment. The content emphasized the Ribbon and new time saving features. Outlook was the main focus. Where changes were being made to the DMS, improvements were also discussed.

Firm updates

On-line updates published on firm Intranets kept users involved right from the beginning. Those engaged in the planning stages looked forward to the software rollout. Of course, all firms have individuals that don't like change, but the "information bulletins" that were provided equipped even these users and put them more at ease.

We surveyed the users to see how they felt about the new environment (the Ribbon, the Tabs, the QAT, etc). It was very evident that those who had taken the time to preview the new environment entered training sessions with a positive outlook regarding the

migration rather fearing change. Pre-rollout introductions played a big part on shortening learning curves and acceptance of the environment. By customizing the training methods and delivery options users benefitted, training time was made easier and all projects moved along smoothly.

TRAINING

Assistant training

All firms provided assistant training in a classroom environment. The time allotted and content covered was tailored to the specific applications included in the migration and the needs of the firm. Documentation was provided in the form of Quick References both in hard and electronic format to maximize the benefits of the training.

Where migrations focused on rolling out the core essentials of Microsoft Office®, a three hour session was offered. This provided instruction on use of the Ribbon, working with Back Stage and customizing the QAT. Focusing on Microsoft Word, changes to firm templates, working with styles and working with Quick Parts were covered. The focus on Microsoft Outlook® ensured that users could use the application with the same comfort they had with the previous version. Lunch and Learn sessions were reinforced and added to users' knowledge of new features in Outlook and Word soon after the rollout was completed, to improve user effectiveness and efficiency.

In the majority of firms, a full day of training was provided. Content focused on what was new in Outlook® and Word®. One of the firms completely changed their Word template solution which required in-depth training. Changes to document management features also required concentrated training. One firm rolled out a new DocX® tool bar which included an upgrade to DocXcleanup tools. Proper use of the upgrade button and the traffic light feature in DocX® were emphasized.

OFFICE 2010 MIGRATION - TRAINING & SUPPORT SUCCESS CONTINUED....

When it came to the user interface environment, using the Ribbon effectively was introduced as an “Office” feature. For example the Ribbon could be reviewed in Word or Outlook and then users were encouraged to try it in another application. Whether a full day or three hours, training sessions were fast paced and packed with information.

Lawyer training

Lawyer training sessions varied in length and content. Classroom training was offered in some firms, particularly to associates. A three hour timeframe was scheduled and content included working in the new environment and changes to any other applications like the DMS. In most cases Outlook was the main focus and lawyers who did not work extensively in Word, usually left training after the Outlook portion. Because of this, working with the Ribbon, etc. was covered using Outlook.

In all but one of the firms, partner training was done at-the-desk. The amount of time allowed was dependent on the needs of the partner. One hour was scheduled, but many times, trainers were only allowed limited time (as little as 15 minutes in some cases). With this limitation in place, it was really important that the “top ten” items be covered right at the beginning of the session. Determining how the partner used the system (mail only or worked on documents) at the beginning of the session was important in determining how to proceed. Partners who did not spend an appropriate amount of time training required more concentrated floor support.

Most firms made it mandatory that all lawyers attended some form of training. In fact many firms would not install the hardware with the new system until they attended training. Those opting for the desk side training would have training scheduled to coincide with the installation of their new system. Making training mandatory,

did encourage lawyers to schedule. It was however important to have a flexible plan in place for the end of the project. Lawyers with scheduling conflicts with the planned training were rescheduled for a time convenient to them. In many cases equipment was installed and floor support provided concentrated support. In others, short classroom training sessions were set up to finish off the training as quickly as possible.

Floor Support

Floor support at all firms. Concentrated support was provided for a three-to-five day period immediately following training. The support started with a “first morning visit”. The objective here was to get to the users as soon as possible on the rollout of their new systems. This gave floor support staff the opportunity to check systems and to ensure that all options, settings etc. were installed and working. Users were provided the opportunity to review anything discussed in training. In most cases, the migration planning team provided a “first morning checklist” for use by floor support personnel to review and report issues so that these could be resolved as soon as possible.

First morning visits were followed by desk-side visits, phone support and just-in-time training sessions. At the end of the initial 3-5 day support, users were visited periodically to ensure that they were continuing to work with the new system effectively.

The floor support team worked closely with the Help Desk. When users contacted the Help Desk with an issue best solved with a personal visit the help desk staff could send a floor support coordinator to the user. Access to the firm’s IT support staff by floor support coordinators was important in ensuring that issues could be resolved quickly and effectively. Working together all involved were kept informed on issues, fixes and user needs.

Tracking of issues was done using firm’s help desk tracking systems or simple Excel

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workbooks. Keeping track of issues and resolutions provided insight into issues on the floor. Most firms used this information to prepare Tips of the Week, identify knowledge shortfalls, changes to training, and as a method to maintain procedural documentation needs. Access to the log of issues was provided to all members of training, floor support, and migration project teams keeping everyone informed.

Rollout

When it came to rolling out the system, all project members worked closely to ensure new systems were rolled out for immediate use by staff following training. Experience shows that it is important to rollout the new hardware with software installed as close to training as possible. When delays happen, floor support requirements increase and learning curves are affected. For assistants taking a full days training, systems were rolled out overnight. Floor support coordinators were made available first thing the following day. Lawyers attending classroom training usually had their systems rolled over while in training. Where at-the-desk training was provided, system roll-outs were scheduled with trainers to ensure someone was available immediately after the system was installed...

Over the last 20 years, CTD has spent many hours assisting with the migration from one Office environment to another. The changes from the Menu system in earlier versions of Office to the Ribbon based user interface represents the most formidable changes to Microsoft Office in the Office Suite's history. Not since the move from WordPerfect, have users had to face major changes to working with the environment. Good planning, up-front user involvement, training and support combined with an environment developed with the user in mind have made for successful projects. Lawyers, assistants and staff all have testified that with the training and support of all involved, it has been the easiest transition they have ever made.

For more information on proven methods for handling an Office 2010 project, contact Becky Carbray, Creative Training & Development at bcarbray@creativetraining.ca.



By: Shyamala Nathan-Turner

HEALTH CONCERNS WITH AN AGING WORKFORCE

Because of the aging population and the general slowdown in many economic activities, employers everywhere face an aging workforce. Compared to younger individuals, older workers are said to contribute more wisdom and experience to the company. However, an increase in older workers also means an increase in employees with health problems and a rise in expenditures for various healthcare benefits. As more people work into their golden years, reports of accidents and injuries grow in the workplace. This greatly demands the full attention of employers, who want to reduce accident-related problems in their companies.

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HEALTH CONCERNS WITH AN AGING WORKFORCE CONTINUED....

The Risks

Unfortunately, many companies and employers are still unaware or misinformed of the health and safety hazards this aging workforce may present. Some of the concerns in having an aging workforce are as follows:

1. Older workers are more prone to workplace accidents and injuries. Moreover, it takes them longer to recover and return to work after they are hurt or injured.
2. Older workers suffer from chronic health conditions, which can hinder them from doing their work efficiently. There will definitely be work limitations especially if the work requires the use of one's physical abilities.
3. Incidences of occupational diseases grow faster and more serious in senior workers.
4. Employers can expect an amplified case of absences from work. Age and health status significantly affect the workers' ability to go to work and perform their job on a regular basis.

As an employer, one should be responsible for the well-being of his employees, old and young alike. The employees' illness, accidents, and other injuries can cost the company a lot of money. Likewise, safe and healthy employees are more productive and efficient with their work, bringing in more money to the company.

The Advantages

Because of their knowledge and familiarity with the tasks, the older workers can actually be the companies' greatest assets if only they are well taken care of and managed by their employers. By ensuring a safe and healthy work environment for these older employees, employers not only support the workers but also help the company itself.

There are several solutions to this aging challenge. If the employers properly address this issue, companies will benefit from happier employees, better productivity, lesser absences, and accident-free work environment. So, what should employers do to protect their employees, especially the older ones?

Here are some ways they should consider:

1. Attitude toward the aging labour force should change. Employers should see the older employees as assets and not liabilities. Instead of trying to fire or get rid of them, why not find ways to improve their work environment, giving them the chance to prove their worth.
2. Managers and supervisors should be educated on age-related issues and proper ways to handle the aging workforce. Age management coaching for the company's human resource department proves to be efficient for employers and employees alike.
3. Working life of the older employees should be more flexible. A work life reform is needed. It should be appropriately adjusted to age to minimize accidents at the workplace, which are usually caused by the disparity at work. The challenge really is to find adjustments needed at work and act on it.
4. Importantly, health care services should be improved. There is a need to strengthen the health care services and benefits to meet the growing needs of the older workers. Health and wellness programs for workers of all ages can actually help enhance their health status and work performances.

The goal of both the employers and workers should be to reduce work-related problems such as occupational injury, accidents, and illnesses that come with the aging workforce. With the maturing population and the subsequent recessions, companies should be ready for the aging workforce. That said, work life for all employees must be lengthened, or else the companies might not survive.

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By: Janet Ellen Raasch

NEXT GENERATION OF LAW FIRM WEBSITES INFLUENCED BY SOCIAL MEDIA

The best law firm websites have an entirely new look and feel. Propelling these dramatic changes are the user interfaces and content delivery systems popularized by smartphones and tablets, as well as online usage preferences and habits created by social media.

In light of these changes, your law firm website is more important than ever before.

Research conducted by [Greenfield/Belser](#) and the Brand Research Company shows that more than 75 percent of potential clients locate and vet lawyers online, and that these clients are profoundly influenced by the quality of your website. Amazingly, it takes users only about 1/20 of a second to form an initial impression of your firm.

“Your website must convey your message strongly, succinctly and in very little time,” said Joe Walsh. “In the old days, when first meetings took place in your office, law firms invested a lot of money in attractive office space. Today, these meetings take place online. Your online space must create a strong impression.”

Walsh is a principal and creative director at Greenfield/Belser, a national leader in brand research, strategy and design for professional services firms. He recently discussed website trends and best practice



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Social Media Sets the Pace

The most-popular social media sites offer users a “mash up” up different applications and a strong graphic navigation system. These elements are migrating to websites. So, too, are social media themselves.

NEXT GENERATION OF LAW FIRM WEBSITES INFLUENCED BY SOCIAL MEDIA CONTINUED....

Social media “buttons,” with links to the firm’s content on sites like LinkedIn, Facebook and Twitter, should appear on every page. The firm should consistently post fresh content to these social media sites as well as the firm’s own website.

“Navigation, or how you get around on a law firm website, need not be limited to the usual navigation bar or internal links,” said

Walsh. “Navigation presents a wonderful opportunity for creativity, especially when links are incorporated into graphics.

“In an illustration, for example, you can click on a graphic and be taken to more information about that subject,” said Walsh. “An industry page can present with a page-full of client logos. When you click on the logo, it revolves and the case story appears. The bio page can present with interesting pictures of lawyers. When you click on the picture, the bio appears or the lawyer steps forward and talks to you.”

Even Microsoft is betting on image-oriented navigation for its new operating system, Windows 8. Instead of the usual menu-based navigation, it is using clickable “live tiles” on the home page, which are not only links but also stream new information.

Also carried over from social media is an increased comfort with scrolling. Until now, web designers aimed at creating short pages that precluded the need to scroll. Because of social media, users are now much more comfortable using scrolling. This opens up new design opportunities.

“Finally, within the next 18 months, mobile devices will be used more often than computers to access the Internet,” said Walsh. “Law firms must create mobile

versions of their websites with layouts that look equally good on smartphones and tablets.”

Stand and Deliver

“Most existing law firm websites are based on similar templates,” said Walsh. “Most often, this consists of some version of a large horizontal photo, with three columns of content underneath. Navigation runs along the top and bottom.

“They all look pretty much the same and say the same thing,” said Walsh. “In my opinion, they are wasted pixels. How is a potential client supposed to use this information to choose you over another firm that looks and sounds exactly the same?”

“Break out of this mold,” said Walsh. “Stand and declare. Toss away the templates and have the courage to try something completely original and different. Your home page can look any way you like, and say anything you want it to say.”

Your home page should make you stand out from the crowd. “Too often, law firms get bogged down in text on their homepages,” said Walsh.

“Determine what makes your firm unique. State it prominently. In fact, make this just about the only text on your home page. Repeat this brand message on every page (even search pages).

Toss away the templates and have the courage to try something completely original and different.

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“Any graphics used for your homepage and elsewhere in your site should also reflect your uniqueness,” said Walsh. “This automatically rules out stock photos and other stock images, like globes, courthouse pillars, and striding businesspeople carrying suitcases. It rules out the use of models instead of your own lawyers and staff.

“Especially, you want to rule out photos of skylines, buildings, lobbies and conference rooms,” said Walsh. “Do you think that the fact that you are in a city, in a building, have a lobby and offer a furnished conference room in any way makes you unique? It doesn’t. Don’t waste your valuable homepage or website space on clichés.”

Think Like a Client

Too many law firm websites function as online brochures, talking on and on about the firm and its “features” – its history, its practice areas, its lawyers and its news. Research shows, this is not what visitors are interested in.

Potential clients are interested in “benefits” rather than features. They want to know that you have solved problems like theirs, for businesses in their industry, successfully in the past. They want to know that you will answer their phone calls, staff their matters correctly, provide them with ongoing education and bill them appropriately.

“Organize your website around client industry and client needs, not your law firm organization chart,” said Walsh.

“Potential clients also want to work with a law firm that is a good cultural fit,” said Walsh. “After all, law is relationship-based. Don’t be afraid to let your personality shine through on your website, and don’t confine personality to the careers or bio section. Let potential clients know what it would be like to work with you over the long term.”

One great way to demonstrate client-orientation is through the use of client matter or case stories. “Use short, vibrant stories to showcase your firm’s professional values and the way you solve problems,” said Walsh. “These can appear in many places – in bios, in practice area descriptions, on industry pages and in dedicated ‘experience’ sections.”

Of course, you must get client permission to use these stories.

The New Graphic Website

Today’s online news, content and social media sites are rich in graphics. Take a look at Facebook, Flickr or Pinterest. Carefully consider USA Today, or the homepages of CNN.com or MSN.com. Today’s effective law firm website should also use graphics.

Photos are an important element, as long as they are original (not stock) and reflect the firm’s unique message. Imagery is central and defining. Photos should do more than simply break up blocks of words.

Also, photos are a good way to demonstrate client-orientation. Make ample use of photos of clients, their businesses and their industries. Photos of lawyers that appear on their bios are often stiff headshots. Instead, use a less-formal photo that provides additional information about the lawyer’s personality and interests.

“But don’t limit yourself to photos,” said Walsh. “There are many interesting ways that other types of graphics can be used to display information. Why present a dense page of unreadable text when a list, chart, table, map, diagram or illustration could present the same information in a much more interesting and compelling way?

Online elements like surveys, questionnaires and “games” invite user interaction.

Think Outside the Box

“On the websites we design,” said Walsh, “we often use handwriting and drawings. We create diagrams on whiteboards.

We arrange a collage of personal and professional items on a lawyer’s desk or on a bulletin board, and use that picture on the lawyer’s bio.”

In a website designed for a law firm composed of lawyer/scientists, Greenfield/Belser used the layout of the periodic table of the elements to organize information on the site. “This resonates strongly with the firm’s clients in the scientific community,” said Walsh.

Colour, motion and sound also grab attention. “Online colour is free,” said Walsh, “and yet many law firms fail to make full use of it. In the age of YouTube, visitors to your website are used to video and animation. Although eight minutes of a talking head can be deadly, 30 seconds of a professionally done video can be extremely effective.”

Don’t be afraid to let your personality shine through on your website, and don’t confine personality to the careers or bio section.

Webinars, seminars and presentations should be recorded and made available on a law firm’s website. “We recommend building a ‘mini-site’ for a special event within the main law firm website,” said Walsh. “This includes information about the benefits of the event, the presenters and the topic, as well as links to useful resource materials.”

NEXT GENERATION OF LAW FIRM WEBSITES INFLUENCED BY SOCIAL MEDIA CONTINUED....

Certain items lend themselves to be broken out or placed in sidebars as graphic elements for special emphasis. These include case stories, client testimonials (print or video), fast facts, awards, accolades and rankings. This sort of information disappears when it is buried in paragraphs of text.

Keep Online Content Fresh

Previously, law firm websites content consisted mainly of words and pictures. Today, they include a vast range of content, from illustrations to webinars to video. No matter what the type of content you

The best law firm websites do not sell, they teach. They establish law firms as thought leaders in their targeted niches.

are posting, however, one rule remains the same. It must be kept fresh. Each time you add new content to a law firm website, it “shakes” the web and attracts the search engine spiders to take a new look.

“Words will always be an important part of law firm websites,” said Walsh. “We just have to be more careful how we use them. On the Internet, people read 25 percent slower than they do on paper. Plus, they scan rather than read. You cannot present them with a dense block of grey text and expect them to read it carefully - or at all.

“Headlines and subheads are important for providing ‘clues’ to the busy reader,” said Walsh. “Sentences and paragraphs should be kept short and active, with lots of white space. Lists and bullet-points are good, as long as they are not too long. Keywords should appear in headlines and subheads,

and in the first paragraph of any text.

“Avoid abstract language about legal concepts,” said Walsh. “Use concrete, engaging stories to keep readers interested.”

Lawyer bios or profiles are a good place to introduce fresh content. Most law firm bios consist of a dry list of accomplishments. Instead, create bios and profiles that truly reflect an individual lawyer’s personality. What makes him or her unique? Supplement credentials with meaningful quotes and personal outside-the-office interests. Support this message with meaningful graphics.

The best law firm websites do not sell, they teach. They establish law firms as thought leaders in their targeted niches. In addition to case stories, websites should provide links to a steady supply of original work like the firm’s blog posts, e-alerts, newsletters, white papers, analysis and original research.

Law firms should know that more than 75 percent of potential clients will use the Internet to find and research them before making a call. In the Internet age, your website has become extremely valuable real estate. It should look and feel unique. One way to do this and set you apart from the competition is to adopt the look, feel and navigation techniques made popular by social media.

Janet Ellen Raasch is a writer, ghostwriter, editor and blogger at Constant Content Blog who works closely with professional services providers - especially lawyers, law firms, legal consultants and legal organizations - to help them achieve name recognition and new business through publication of keyword-rich content for the web and social media sites as well as articles and books for print. She can be reached at (303) 399-5041 or jeraasch@msn.com.

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