

April 2014

TLOMA Today

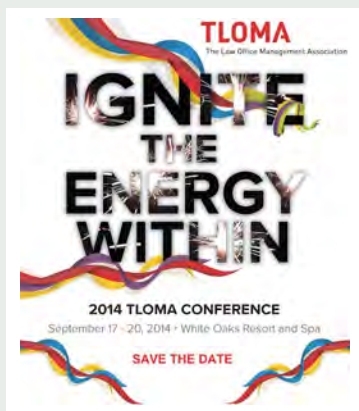
A publication of The Law Office Management Association

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- **Stress Management**
May 13, 2014
- **2014 TLOMA Compensation & Benefits Survey Training Session II**
May 28, 2014
- **Spring Networking Event (Members Only)**
June 6, 2014
- **Key Elements of Litigation Support (Part II)**
June 11, 2014

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TLOMA Today

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Managing Credit Card Payments for Your Trust Accounts

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PRESIDENT'S MESSAGE

By: Karen Schrempf

Happy Spring! Hopefully it is truly here – although more snow looms in our forecast! Last month Paul Page and myself in our roles of Vice President and President had the opportunity to attend the BCLMA Conference called *Law Firm Leadership – All Hands on Deck*. As Janice Rooney reported last fall, we facilitated a tri meeting of the Executive Committees of ALA, BCLMA and TLOMA. One of the initiatives agreed to was reciprocity in terms of extending two complimentary conference registrations to each Association's Executive or Board. At our 25th Annual Conference last September a number of you will have met Anita Parke, BCLMA President, Susan Spalding, Director, and Jane Kennedy, their Administrator.

The conference opened with Judy Hissong, CLM, a powerful and dynamic speaker who engaged us with a personality trait assessment. Her premise is successful and influential leaders know themselves, and you need to identify your primary strengths that motivate you to be able to lead others. Judy opened her session with a thought-provoking statement from the management consultant, Peter Drucker, "Management is doing things right; leadership is doing the right things".

Peter Smythe, Ph.D., focused on reflective leadership and we explored the significant differences between being responsive and reactive, and the profound effect on

outcomes where being reactive, in most circumstances, will yield less effective results. Peter said leaders can be both people focused and outcome focused, and good leaders are a blend of both.

I wanted to share a few threads of discussion that came from the progressive learning delivered by the speakers:

You don't have just one leadership style. Absolutely leaders have a prevalent style, but effective leaders are able to adjust to suit the circumstances.

Without a doubt we know how we lead affects how successful we are in engaging other people. One of our speakers, Susan Wazny, MSc, Dip. Rec. Leadership, CRC, said we need to avoid triggers that the behaviour of other people puts upon us. She suggests in order to avoid becoming upset yourself, to be curious and ask questions of the person you are dealing with in order to better direct the conversation to resolution.

A good leader doesn't have to resolve everyone's issues and problems! Too often as members of the management team in our firms, we take on to our already overburdened shoulders the responsibility for finding the solution. Leaders don't have to resolve! What good leaders do need to do is lead people in finding solutions.

Susan Wazny's session was on building employee capacity through engagement. We all know in the demographics in our firms that employees are no longer "lifers" and "employers are faced with needing to find authentic ways of engaging employees for retention and succession planning. Research shows that good communication, meaningful work and relationships are what keep employees motivated." In our

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leadership roles, Sue suggests in order for your team to reach their potential, it is our responsibility to recognize capability, create opportunity and provide learning for the members of the team. You commit to and empower people and as a result employees should be positive producers and contributors to their firm.

One size of leadership style doesn't fit all. Suzan Beattie, B.A., LL.B., CPCC, discussed various leadership types, theories and styles.

And finally without a doubt, as in any relationship, there must be trust and respect. Leaders have to build trust and earn respect, and leaders need to trust the members on their teams in order to ensure a coherent and effective group.



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Our friend and colleague, Karen MacKay, founder of Phoenix Legal, and former member of TLOMA and President in 1995-96, brought the Conference to a close and in that collaborative role had the daunting task of pulling our learning together. Karen says leaders are not born but they are developed, and we shouldn't let "busy" get in the way of effective leadership. She challenged us to identify actions we can take to leverage our strengths and collaborate to positively impact our firms. Karen said we first need to identify obstacles and be curious in gathering information in order to be able to change behaviour and make change happen. Karen suggests that "In order for managers to be passionately engaged in their work in the firm, they must find opportunities to reach their professional potential".

Now for a few TLOMA updates. I am pleased to report to the Membership on the annual Corporate Handover meeting of the 2013 and 2014 Boards held on March 19, 2014. TLOMA's lawyer, Derek Powers of Borden Ladner Gervais LLP, and our accountant, Bruce Reilly of Reilly CA Professional Corporation, attended to provide their respective annual reports to the Board and to confirm all business pertaining to the Association is in good standing. The year end financials have been posted to the Members Only section of the website. Please contact Cathy Byrnes, our Treasurer and Finance SIG leader, should you have any questions.

We are pleased to welcome 27 new members to the Association and nine attended the New Member Breakfast held earlier this month. We encourage you to always watch for and welcome our newest members to TLOMA and to assist them in meeting members, building relationships, and in getting involved.

National Volunteer Week was last week. Volunteering is about what you can do, not what you can't. Consider participating in something you are less familiar with to enhance your learning. There are many volunteer opportunities in TLOMA ranging from helping at meetings, to being on the Board or on a Committee. You won't be disappointed with the professional development you will achieve, the friendships you will make and the satisfaction of contribution you will enjoy.

I close with a quote from the well known author, Stephen Covey:

*"Management is efficiency in climbing the ladder of success;
Leadership determines whether the ladder is leaning against the right wall."*

Karen Schrempf

2014 TLOMA President



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By: Diane Craig

PROFESSIONAL GROWTH THROUGH SELF-EVALUATION

Though many attempt to avoid the task, regularly evaluating one's own work, habits, objectives, strengths, and areas for improvement is necessary for any successful professional. Consistent self-reflexivity will allow you to understand what you need to work on to become a stronger professional, as well as help you to identify opportunities for advancing to the next level in your career.

While critical self-reflection can be a challenge, luckily there are many resources available to help you improve where you need it. In this post, we outline a few common areas for improvement, as well as some tips and training opportunities to tackle them.

When you ask yourself how you could improve, how do you answer?

- *"I am uncomfortable presenting in front of groups."*

Many people admit that public speaking is their biggest challenge. If you find yourself constantly dreading the next presentation you have to give or the next time you are in front of the boardroom, plan to take concrete steps – before, during, and after your presentation – to alleviate your fears.

Before you speak publicly, do what you can in advance to make yourself [as prepared as possible](#): Practice your presentation at least three times before you deliver it to others. Craft a winning PowerPoint or Prezi presentation that you feel proud of.

If possible, rehearse with the presentation equipment so you can be sure that technical difficulties won't arise.

During the presentation, your own body language can make you feel more confident. Try striking a [power pose](#): even if you don't feel confident, making yourself look strong and competent – or, "faking it until you make it" – will actually make you feel better.

After a presentation, take a few minutes for further self-reflection. Ask yourself, "What went well? Where could I have improved?" Taking stock when an experience is fresh in your mind will help you to prepare for next time.

- *"I have issues communicating with difficult colleagues."*

Effective communication is so important to the success of individual professionals and a workplace as a whole. But when internal or external contacts are difficult to communicate with, it can be tempting to just give up entirely on communicating effectively.

Not so fast. Avoiding communication may be an easy fix in the short-term, but good communication skills are vital for long-term professional relationships. In fact, a lack of effective communication may even be the root of the problem. Straightforward, clear communication with a positive tone – whether in face-to-face conversation, email, or over the phone – is the best way to go. Negative comments or the "cold shoulder" are never constructive in business.

Additionally, refining your Executive Presence will lead to good communication skills. Executive Presence can enable you to solve issues in the workplace, and can help you build rapport with others and foster positive relationships. Training programs and seminars can help you to improve these skills.

- *"During stressful situations, I can't think straight or I become irrational or angry."*

The ability to maintain grace under fire is a [key element](#) of Executive Presence. Of course, this is easier said than done. One major way to improve the way you handle intense pressure in a stressful situation is to [manage your overall workplace stress](#). To keep stress in check on a daily basis, try taking short breaks throughout the day, schedule activities outside of work that focus on other goals or interests, and stay organized. Attempting to stay calm and composed on a regular basis will help you keep control when situations escalate.

You will also need tactics for those especially intense moments. If a stressful situation involves a colleague or another contact, [Psychology Today's Preston Ni](#) suggests taking a deep breath and slowly counting to ten before saying something you might regret. Or, if you are at the brink of a difficult decision, Ni recommends doing a cost-benefit analysis by listing pros and cons and numbering them in order of importance. This allows you to step out of the stress and see situations in a logical way.

In which areas do you need to improve? How do you stay self-reflective? As President and Founder of Corporate Class Inc., Diane Craig's ongoing 30-year career mentoring North America's business professionals spans Fortune 500 companies, multinationals and numerous educational institutions. She is acclaimed for her Executive Presence Training System. While providing customized training aligned with organizational goals, Diane's System, recognized as "the gold standard for corporate training," facilitates employee advancement at every stage of corporate life. Its focus is to ensure key employees and leaders – from new recruits to C-suite executives – achieve their optimum potential. www.corporateclassinc.com, dcraig@corporateclassinc.com, 416-967-1221 ext 101



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By: Charles Abraham, C.A.

MANAGING CREDIT CARD PAYMENTS FOR YOUR TRUST ACCOUNTS

In today's competitive environment, legal firms need to adapt to the demands of their clients to differentiate themselves or simply to keep up with their competition. In the world of payments, this has manifested itself in the wide spread acceptance of credit cards. Clients seeking easier payment schemes or simply looking to generate loyalty points on their credit cards are demanding that their legal firms accept this form of payment.

At the retail level, credit card payments are ubiquitous and accordingly one can make the mistake of assuming that the implementation of this payment model is fairly simplistic. However, the Law Society of Upper Canada under its Practice Management Guideline, subsection 4.10, Use of Credit Cards, provides that while it is perfectly fine for lawyers to accept credit cards, certain conditions must be met. In particular, these conditions deal with the segregation of funds for trust accounts:

1. All service charges, discounts and other fees payable by the lawyer to the financial institution are deducted from the general account and not the trust account;
2. Credit card payments for retainers shall only be deposited directly into trust accounts and credit card payments for payments on account shall only be deposited directly into the general account;

3. Client confidentiality is maintained - the sales slip shall not indicate the nature of the legal services only the words "legal services" plus a file number and dollar amount;
4. Amount of the charge is inserted at the time the client signs the slip;
5. The words "trust account" appear on the original credit card slip;
6. Sales slip is presented for deposit in the appropriate trust account in accordance with the By Laws; and
7. Credit card company discount or fee is not charged to the client.

In practical terms, this means each law office that accepts credit cards, should ensure they have two distinct merchant accounts - one for the general (operating) account and one for trust funds. Each merchant

account acts as a transaction repository and funds are swept from it each night. In order to ensure segregation of funds, staff should be trained on the intention and cash flow behind each merchant account.

The next major challenge for the law office manager is to ensure that the fees behind the merchant accounts are deducted from the general account and not the trust account. Not all credit card processing companies are capable of this dual account process and accordingly you should confirm this prior to establishing your merchant account.

The final piece to determining the credit card payments process is to determine which level of technology would best suit your office environment. When most people think of credit card acceptance, they think of a standard terminal that is fixed to a desktop. However, there are a plethora of secure alternatives on the

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market today. These range from portable Bluetooth devices, to wireless cell phone based solutions. However, gathering prominence in professional offices that take credit cards over the phone is the VirtualMerchant (web browser based) solution. Typically a single VirtualMerchant solution will support multiple merchant accounts (trust and general) and it is securely deployable to any administrative person that has a standard browser enabled on their computer. In addition, VirtualMerchant has the added benefit of enabling online reconciliation making the accounting function that much easier.

In summary, it is important that your payment solutions are tailored to the way you do business and that can only be accomplished if your provider has a

thorough understanding of your needs. Planning is critical, so make sure you and your provider take the time to discuss your business requirements. This will ensure your costs are minimized and your trust and general accounts are not mishandled.

Charles Abraham is an alumnus of St. Francis Xavier University, a Chartered Accountant and President of Oak Merchant Solutions Inc. Charles has served on numerous Boards and is a past Advisory Committee member to Elavon. He has been enabling credit and debit card payments for merchants for 14 years. Oak Merchant Solutions (www.oakmerchantsolutions.com) is a registered MSP/ISO of the Canadian branch of U.S. Bank National Association and Elavon. Charles can be reached at (855) 644-1965 or cpa@oakmerchantsolutions.com, www.oakmerchantsolutions.com

UNDERSTANDING EMPLOYEE BENEFITS REVISITED

By: Ed Hertzman

Some things in life are certain: death, taxes and group insurance renewal 'adjustments'. I last spoke of 'Employee Benefits' at the January 2005 TLOMA Human Resources SIG. Since that time, all firms have gone through several annual renewals. There have been further pressures in the insurance industry to add to the concerns of cost containment. Manulife, Great-West Life and Sun Life control 80% of the Canadian group insurance market. There has also been consolidation in the benefits consulting industry with fewer options and higher fees. Healthcare trend is lower, running at about 11% and Dental 7%. Waiting times for medical procedures is increasing. All of the above factors are unfortunately, out of our control as HR professionals!!!

What we can control is overall design of a benefits plan, corporate philosophy, salary and working environment. The ideal benefits program should be generous in the level of benefits offered, cost-effective, flexible enough to make changes down the road to accommodate change as your firm requires either for cost containment or flexibility issues.

The areas where we can have some control are the costs associated with plan administration and the design and funding of our own plans. The way we typically deal with renewals is by conducting a market survey to make sure our premium is in line with other insurers. This works for pooled benefits like life insurance, long-term disability and out-of-country coverage. These premiums are based on large and unpredictable claims as well as group demographics. Unfortunately they only account for a small portion of our overall premium. Health and dental are the majority of our premium dollars and we should be looking at these components in more detail. These premiums, depending

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on the size of firm, are based on a combination of our own claims history as well as the insurer's pooled rates. These claims account for most of the claim dollars and are somewhat predictable in nature, like dental check-ups and maintenance drugs. A further breakdown is needed of all the built-in fees above the cost of the paid claim: commission, profit, inflation assumptions, pooling charges/limits, reserves and claims/transactions. Once we have a handle on these fixed costs we can then better look at our funding arrangements. Small groups (3-35) are usually partially experience-rated where mid-size to large groups are fully-experience rated to self-insured.

To help guide you through this complex and every changing insurance industry, the first step is to have confidence in the independent advice of your employee benefits professional. The most common concern I hear is not if help is required, as it always is, but where to find a benefits consultant to meet my needs. No one consultant is suitable for every situation. Before looking for help it is important to know what you want to accomplish. Do you need a full plan review and marketing or only one component of your plan looked at? The best way to find a benefits consultant is through word of mouth or within an association, like TLOMA. The most neglected area I come across is the amount of premium dollar that goes to the insurer instead of directly to paying a claim. In 2014, I would focus on the reduction of excess fees built into your plan, as some of these costs have decreased over the past couple years. Most insurers are public companies and must have a certain return on investment for shareholders.

As founder of Hertzman & Associates Benefits Consultants in 1988, Ed has been helping clients ranging in size from 3 to 3000 employees with all aspects of their employee benefits plans. He has many clients in the legal community and has written several articles in industry publications to help employers make educated decisions.

Edward Hertzman, ehertzman@aol.com, 416-487-3607



BOOKKEEPING MATTERS

Useful Bookkeeping Tips

By: Keith Hill, Jr.

Whether you're launching out to start a new practice on your own, or perhaps you're a seasoned partner in a multi-lawyer firm, ensuring your bookkeeping is properly managed is fundamental to your practice. However, after spending countless hours studying law, most lawyers would rather not be burdened with the meticulous numbers driven aspects of recordkeeping- for some, this can bring about the feeling of a return to post-secondary studies, with accounting as their new major.

A good analogy I've heard is that wanting a lawyer to regularly maintain their books, which takes them away from their practice, is akin to a husband having to mow his lawn during his favourite sporting event - you know it has to be done but you'd much rather be inside doing what you enjoy!

In order to lessen the burden (including the financial one), below is a list of useful bookkeeping tips.

Six Useful Bookkeeping Tips

1. Decide Who Will Do What

When deciding who will do what, the first "who" in this equation is the lawyer. Some lawyers prefer to be more hands-on

BOOKKEEPING MATTERS
USEFUL BOOKKEEPING TIPS
CONTINUED....

while disinclination curtails the approach of others. Once you gain understanding on your firm's bookkeeping needs, decide which aspects you are willing to tackle yourself, the rest will become delegated. Delegation can be to in-house staff or to an outside bookkeeping company.

2. Self-Docketing

The one area where delegation is NEVER recommended is docketing. Docketing is the lifeblood of the business and many lawyers leave dollars on the table by not maximizing on their billable time. Docketing directly into your software is the most effective means of keeping track of billable time. Input of time contemporaneously will ensure your six or twelve minute dockets are captured. Trying to piece together a week's worth of dockets tends to leave dollars on the table instead of in your pocket.

3. Credit/Debit Card Use

Limit credit cards and debit cards to one of each. Multiple cards mean multiple reports and more time and expense creating them. Along these same lines, it would be beneficial if only business expenses went through these accounts. Also, consider pre-authorized payments for reoccurring transactions.

4. Use Your Software

Don't just own the software, use it! Robust programs like PCLaw have many layers of features and functionalities, all of which are designed to assist your firm with productivity, efficiency and in some instances, corporate presentation. If you are unfamiliar with certain aspects of the program of your choice, consider hiring an expert to provide training.

5. Manual Paperwork

Keep detailed legible records of deposits, cheques and other manually recorded documents. Unintelligible or incomplete documentation means being interrupted by your bookkeeper for clarification and longer time spent updating your books – both of which affect your bottom line.

6. Backup and Storage

As with all computer software programs, backing up your data is vital. Backup options range from conventional external hard-drives to cloud-based storage. Regardless of your means, backing up regularly is imperative. Also, paper documentation should be stored appropriately for a time period as outlined by the Law Society of Upper Canada.


Stepping Over Dollars to Pick Up Dimes

While considering all of the above, keep in mind the cost-benefit. For instance, hiring an outside bookkeeper may be an added expense but their expertise can provide a “financial peace of mind” for lawyers. Or the cost of a cloud-based storage provider may not seem necessary but the benefits can outweigh the costs in many instances.

As the old adage goes, “don't step over dollars to pick up dimes”. This saying is particularly true in the business of law where time is literally money. Hence, the common denominator in this list is not about limiting your expenses per se; the emphasis is on finding ways to effectively and efficiently manage your bookkeeping in a way that maximizes the input and capture of your billable time.


Keith Hill, Jr. is a Certified Independent Consultant (CIC) in PCLaw Practice Management Software and is an Associate at Accounting for Law. For 14 years Accounting for Law has been satisfying bookkeeping needs for lawyers throughout the GTA and parts of Ontario. Keith can be contacted at: keith.hill@forlaw.ca / 647-459-4LAW / www.forLAW.ca

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SAVE THE DATE



By: Rick Comish

YOUR OFFICE LEASE AND OPTION TO RENEW

Near the end of the lease term, nearly all commercial tenants have to decide if they wish to exercise their option to renew their lease.

From our point of view, an option to renew is something that a tenant probably should not exercise. Why? Exercising your option to renew should really be viewed as an option of last resort. It should be used only in cases where your Landlord may not want to renew your lease and it is prohibitively expensive, too inconvenient or too disruptive for your company to move.

Exercising your option to renew is a defensive move which might have some potential negative elements and costs, such as:

1) **Establishing the Rental Rate** - To exercise a renewal right, the tenant formally notifies the landlord of its intention to do so. Essentially the tenant is guaranteeing that they will stay for another term and then tries to negotiate the best market rental rate. It is like walking into a car dealership and guaranteeing you will buy a car that day and then trying to negotiate the best price. There may be an arbitration process to assist tenants in determining a market rate, but this can be an expensive and time consuming process.

2) **Timing** - Further, the timing of determining that rate is often chosen by the landlord, usually to its benefit. The option may be exercised today, but if rates are rising, the landlord may not agree to

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determine what the market rate is for another 9-12 months.

3) **No Further Options** - Unless your existing lease has multiple options, the tenant does not usually have a further option to renew.

4) **Inducements** - The tenant cannot negotiate to include any inducements: no free rent, no tenant improvement allowance and no landlord work to be performed in the premises.

5) **Length of Renewal** - The tenant cannot negotiate the length of the lease term. Whatever is stated in the lease is the length of the new lease term. Even if your business plans indicate that it is better to have some flexibility with respect to your lease term by selecting a shorter term lease, you don't have the ability to customize your lease.

6) **Size of Premises** - The tenant can only renew on its existing premises. If it wishes to reduce or expand the premises, then an option to renew cannot be invoked.

While having an option to renew should be viewed to be of some benefit by a tenant, our view is that an option to renew has limited value. It should be viewed to be more of an insurance policy . . . one you don't want to activate unless you are forced into that situation.

*Rick Comish is a Partner/Sales Representative with Ellington Tenant and Facilities Services. Ellington Tenant and Facilities Services specializes in representing tenants to negotiate their leases and also provide facilities management support on an as needed basis.
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By: Margaret McCaffery

HELLO, MY NAME IS... INTRODUCING A NEW LAWYER TO YOUR FIRM

When new lawyers join a law firm, HR gets geared up with payroll, benefits, and insurance, while Facilities scrambles to find

appropriate space for the new lawyers and IT rolls out the new lawyers' computer and phone

systems. And that's in firms big enough to have HR, Facilities, and IT departments. In firms where the office manager or firm administrator does everything non-billable, who has time to think about marketing?

But the arrival of a new lawyer is a major marketing opportunity. At best, it's a significant enhancement of the firm's capabilities (and possibly clientele—more about that later). At the very least, it's an increase in bench strength. Most importantly, it gives everyone, yes, everyone, a reason to touch base with clients and referral sources.

That the arrival of a new lawyer or group of lawyers must be marketed outside the firm is obvious. Marketing the new arrival within the firm is not so obvious, but equally important.

Marketing Outside the Firm

Even if marketing the new arrival to those outside the firm is more obvious, it shouldn't be left solely to the Marketing department. News from the firm should

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HELLO, MY NAME IS...INTRODUCING A NEW LAWYER TO YOUR FIRM CONTINUED....

always be treated as a touch point in maintaining client relationships. It's especially important for clients who may have no knowledge of the firm's capabilities other than your services. "I didn't know you did employment law" might be the response from a client of the corporate practice group on being introduced to the firm's newest employment lawyer. That's an opportunity to educate your client on your firm's other services, which is an important aspect of client retention. The more of your firm's services a client uses, the more likely they are to stay with you.

Perhaps the new acquisition is a high-profile one, or a movement from a bigger, more influential firm. That's a good message to send to existing clients and referral sources, to show what your firm has been able to attract. The new lawyer's clients and referral sources will no doubt wonder why their lawyer chose to move and that's another opportunity to market the new firm—especially since those clients and referral sources have to make a choice as to whether they will follow the lawyer to his/her new firm.

Perhaps the acquisition adds a new skill to your firm's capabilities. This again is a whole-firm message, since existing clients and referral sources need to know that you can now do something more. The most effective marketing campaigns will involve a strategic analysis of the firm's clientele and the clientele of the new lawyers for opportunities not only to cross-sell different practice groups but also to market the firm as a whole.

Marketing Inside the Firm

While marketing the new arrivals within the firm may not be as obvious, it is key to lawyer retention. The firm needs to sell its capabilities to the new arrivals so that they will in turn sell them to their contacts. The new arrivals have to see their new

colleagues as clients: relationships must be built, just as they are with clients. The newbies need to sell their capabilities to their new colleagues—some of whose noses may be out of joint, don't forget. "Why should I introduce him to my clients? Let him find his own clients." In fact, they're all the firm's clients. "How come they're spending all this money on that practice group when I can't even hire a new associate?" In fact, it may be in everyone's best interests for the firm to expand in one direction while maintaining the status quo in another.

Trust has to be earned. Existing lawyers in the firm have to see the new lawyer(s) as a benefit to them—and that's where the wisdom of the acquisition comes under the spotlight. If due diligence was done (on both sides) before the new lawyer(s) came over, firm management should know what the benefits will be and should market those benefits vigorously.

Three words of warning: "book of business". Every firm is on the lookout for the mid-level or higher lawyer with an established clientele who can persuade those clients to follow him to the new firm. Just remember that a "book of business" reflects the past, not the future. The lawyer's clients can choose whether to follow her—or not.

Do's and Don'ts for Integrating New Lawyers

- Do get the new lawyers' contacts (not just clients) into your firm's database immediately and share firm contacts with the new lawyers.
- Don't put off an analysis of new and existing contacts, looking for touch points—memberships in professional organizations, committee participation, charities supported, etc. Who needs to be told what, when—and by whom?
- Do help the new lawyers announce their move, ensuring that their announcements contain your firm's key messages about the move.

- Don't delay introducing them within the firm: create a 'meet and greet' opportunity before their first day of work at your firm.
- Do decide who needs a visit, who merits a phone call, and when an email will suffice. The most important contacts merit face time: besides being good manners, it's an opportunity.
- Don't let someone important hear about it first on the grapevine.
- Do look ahead for opportunities to integrate the new lawyers: can they speak at an upcoming firm seminar, write an article for the next firm bulletin?
- Don't assume the deal is done until the new lawyers are at their desks in your firm. If you think the new lawyers are worth having, chances are their existing firm will counteroffer and steal them back. Yes, it happens: ask any managing partner.
- Do make the new arrivals get new photographs taken: it's a visible indication of their new brand.
- Don't forget their (and your) online presence: update their social media profiles and directory listings and update the firm's online descriptions to include the new arrivals.

Margaret McCaffery is president of Canterbury Communications, a Toronto marketing/communications agency specialising in professional services firms. Margaret can be reached at 416-782-7828 or canterburycommunications@gmail.com.

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