November 2014

TLOMA TODAY

A publication of The Law Office Management Association

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- **Realizing the full potential of your Client Data**
  November 13, 2014
- **Penny Wise - Pound Foolish**
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- **Ergonomic Accessories for the Changing Office**
  November 25, 2014
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  December 5, 2014

President's Message

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Cubicle Culture: Etiquette in Open Office Spaces

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Life After CASL - Managing Client Data

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Non-Lawyers Survival Guide

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Editor: Janet Baker
Advertising: Liz Barrington

PRESIDENT'S MESSAGE

By: Karen Schrempf

Another annual Conference has come and gone – rich with educational content, networking with colleagues making new connections, and learning about services and products offered by our Business Partners (BPs). From the opening icebreaker Wednesday evening, which was a fun and entertaining team building experience, to the closing keynote speaker and everything in between, it was a great opportunity to learn and grow both professionally and personally.

The Conference opened with General Rick Hillier, retired Chief of the Defence Staff of the Canadian Forces, who engaged the audience with his stories of life in the military, and the families that support our service men and women. He passionately conveyed several messages and I am quite certain many of us left the session much more informed, and definitely more appreciative, about life in our military. One of his small requests – on Remembrance Day, please remember those who have, and those who do, serve our country and how fortunate we are to live in this amazing country. His key leadership messages included:

- Fundamental to leadership is optimism – it's infectious
- Encourage everyone to lead
- Avoid ego and arrogance
- Look people in the eye
- Recognize people without bureaucracy and do so in a timely fashion
- Learn, observe and apply it
- When leadership is missing, the two principles of loyalty and integrity are too
- Deliver on what you say you are going to do or your credibility will suffer.

Our collaborative workshop sessions included:

Leah Simon from Sherrard Kuzz LLP conveyed valuable information on AODA and what we should have in place currently and what is coming down the pipe.

Canadian Olympic champion, Mark Tewksbury, and Debbie Muir, Olympic coach, presented an energetic and passionate session on promoting diversity including connecting participants with leadership principles. They suggested you need to influence wisely, and shared their six essentials of great teams including:

- You need to have a clear vision of the desired outcome
- The roles of the team players need to be clear
- You need to ensure strong focus and get rid of distractions
- Participants have to have a strong belief in self and group
- All need to have a sense of accomplishment and
- Everyone should delight in the excellence of others.

Ann Gomez of Clear Concept Inc. delivered a lively and compelling session on time management. In participating in activities we determined multi-tasking isn't a productive skill. She shared effective tools for managing our bulging email boxes and attendees left the session with some great ideas.

Ann Wyganowski of HZX Business Continuity Planning spoke to us about business continuity planning and emergency response, and the critical need to have a plan to ensure our firms can survive disastrous situations starting with a threat and risk assessment and continuing to review your plan annually.

Mark Gordon, who began FourWord Marketing about 10 years ago, presented an entertaining and lively marketing workshop and shared key information on branding and media.

Tim Cork of Straight A's Inc. closed our Conference with an interesting, thought provoking session. He shared with us his premise that the single most important thing we all need to do is "look after you" so you are empowered and can lead and develop others. His theory on networking and building effective relationships is it's about net"giving".

The fun and entertaining networking events included the icebreaker team competition, Business Partner dinner, and our delegate gala which were well executed and facilitated the attendees catching up with their colleagues and making new connections – a vital component of our TLOMA membership.

The Trade Show was attended by more than 65 Business Partners including kiosks and those who provided event related contributions or sponsorships. Please see detailed information included in this issue of TLOMA Today for participants. The excellence of our Conference is achieved not only because the Conference Committee works so very hard and does an outstanding job, and because of the active participation of the more than 100 delegates, but because of the financial support of our BPs to whom we are very grateful and without whom we would not have this quality event.

Thank you again to the 2014 Conference Committee who did an outstanding job in

PRESIDENT'S MESSAGE Continued...

delivering this year's Conference. You know it's successful when the attendees leave the event with new tools for their managerial toolboxes, new contacts to support each other in their roles, and energized to return to their firms! With my deepest thanks to:

Deborah Davids Conference Chair	**Nancy Lio** Vice Chair	**Mary Lavis** Past Chair	**Roger Rosemin** Business Partner Liaison
Bernard Quilty Events Liaison	**Helen Lee** Hotel Liaison	**Edmund Reid** Marketing Liaison	**Joanne Pinellis** Speaker Liaison
Lucas Szotek Technology Liaison	**Liz Barrington** Director of Administration		

The above is just a brief synopsis to share with our membership a little bit about this amazing Conference and really doesn't do it justice. There is nothing better than attending and experiencing this annual event for yourself. So what are you doing next October 21st -24th? You won't want to miss out on the learning and networking so be sure to include for you and your team Simply Exceptional at Blue Mountain in your 2015 budget!

TLOMA Business Update:

The new vibrant branding was launched at Conference and now the Marketing Committee led by Alison Janzen and Cathy Byrnes will forge ahead with marketing TLOMA and building our membership. The Mentorship Program is officially off the ground with five enthusiastic mentors and mentees. Thanks to Simone MacIsaac and Janice Rooney for their efforts in moving this forward. Anyone interested in participating in either role are encouraged to contact Janice or Simone directly. The 2015 Board of Directors slate has been circulated for your approval so please be sure to support your fellow members and respond by the October 28th deadline.

Stay informed of upcoming events by checking www.tloma.com. I look forward to seeing you at our Professional Development event on October 24th, SIG meetings, and our holiday networking event on December 5th.

Food for thought:

If your actions inspire others to dream more, learn more, do more
and become more, you are a leader.

John Quincy Adams

TRUE PATRIOT LOVE

A TRIBUTE DINNER

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We would like to recognize and thank all of this year's sponsors and attendees for their invaluable support. Through events like this dinner, True Patriot Love is able to continue our mission of supporting the physical and mental well-being of Canadian military members and their families. To date, we have raised over $18 million dollars through the generosity of our sponsors, donors and supporters who are responsible for making events such as this so memorable and impactful. With your help we can continue to honour the sacrifices of our men and women in uniform by providing them the support they need, whether here at home or serving overseas.

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True Patriot Love would like to thank All Canadian Courier for donating the delivery of the 2014 Tribute Dinner auction items.
To commemorate Remembrance Day, a donation also will be made to TPL for every shipment made between Nov. 10 and 14. Thank you!

By: Paul West

INSURANCE FOR YOUR TECHNOLOGY

Imagine, if you will: You have a very expensive piece of hardware that has stored on it your company's data. Without this data, your company would not be able to work and would likely go out of business due to a lack of accessibly to your customer or client records. One evening, there is an electrical storm. The surge burns out the UPS protecting your hardware and the residual surge also fries your very expensive hardware. The data is not retrievable.

The hardware can be replaced, but what about the data? There was a backup plan in place; however, the backups have not been working properly for 2 months and no one noticed. If the data to be restored is 2 months old, will this company survive?

It could happen. It could happen to you. Many businesses underestimate the importance of backups and how vital they are to the normal operations of a business. They may see it as an unneeded expense and should not put it in the budget. But these are the days where climate change is upon us and our aging infrastructure is struggling to keep up. It is not a matter of if, but when you will need to recover your business critical data. The value of backup is in the ability to restore the backed up data. The backup plan should be reviewed annually and improvements made to adapt to the new needs of the organization. Restore testing should also be done at least once per quarter to ensure the backups are viable.

There are several things to consider when reviewing your backup system.

Scalability: If your Data grows by 30-50% per year, will your backup plan be able to accommodate this growth?

Ease of Use: The easier the solution is to manage means the more likely the backup will be successful.

Reporting: Does the backup system provide accurate reporting on the success or failure of backup jobs?

Automation: Does the system operate successfully without human interaction – on weekends and on holidays?

Support: Can you get assistance with fixing a backup or restoration problem when needed?

Frequency: Can the system take multiple backups per day without causing disruption to end users? Many current systems only manage to complete a backup once per day. Imagine being able to complete a backup every 2 hours! In the event of a problem your data would be very up to date!

Modern: Does it support physical and virtual backups? Does it take snapshots rather than doing file by file backups?

Restore: How long does it take to restore the data? Is there sufficient retention time for the data so that you can restore historically? Does it have the ability to restore email mailboxes or messages? Can it restore databases? Can you restore to physical servers and to virtual servers? Can you do a bare metal restore?

Off Site Storage: Is there a facility to move you backups off site in a timely fashion?

Off Site Recovery: Can you get access to your data and applications even if your own data centre is destroyed? Can you do so in 24 hours?

Cost: What is the cost to implement the system? What is the cost of ongoing maintenance and support? What is the cost of off site data storage? Compare these costs to the loss of your data! Backup is insurance for your technology.

Having the right backup system to fit your business could be the difference between closing the deal or business going elsewhere. Backup and recovery protect your firm's most precious commodity, its data.

Paul West is the Network Administrator at 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. Paul can be reached at 647.426.1004. For additional articles, go to www.triella.com/publications. Triella is a VMware Professional Partner, Microsoft Certified Partner, Citrix Solution Advisor - Silver, Dell Preferred Partner, Authorized Worldox Reseller and a Kaspersky Reseller.

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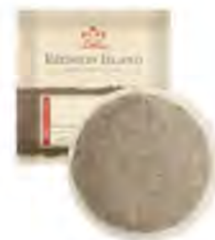

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By: Diane Craig

CUBICLE CULTURE: ETIQUETTE IN OPEN OFFICE SPACES

In any office, it is important to be respectful of others' workspaces, as well as mindful of the presentation of your own. When your office layout is composed of cubicles or is an open environment, considerations of space and conduct are doubly important. As a component of the shared office, all the elements of your workspace – the volume of your voice, the cleanliness of your desk, the perfume you apply in the morning – will affect nearby colleagues as well as the general office atmosphere. In addition, with this type of setup a boss or supervisor can observe employees in a more detailed way: another reason to keep your self-presentation sharp. Finally, it is important to acknowledge the boundaries of each individual's cubicle by not interrupting a colleague at any given moment.

A cubicle is a personal office, but it can't always be treated as if it has a closed door. If you sit in a cubicle, the proximity to your neighbours and the exposure to the overall office environment probably serve as daily reminders of this fact. Nevertheless, too-close-for-comfort cubicle behaviour continues to plague offices. Here are a few basic points to work by in order to maintain a comfortable and friendly open office setting:

Manage the volume of your voice. This includes conversing with colleagues in person and talking on the phone. It can be difficult to remember to keep one's voice down on the phone, especially if it is a cell – and if a connection is bad, the caller's voice can rise to a shout without even realizing it. So, tone the volume down a notch if you tend to speak loudly. In addition, do not use speakerphone: it is disturbing to others around and it betrays the privacy of the call.

Avoid strong scents. Heavy perfumes and colognes will waft to neighbouring cubicles, and could disturb colleagues with allergies or scent sensitivities. And if lunchtime consists of a tuna sandwich or other food with a strong smell, consider taking lunch in the breakroom or cafeteria instead of at your desk.

Keep your workspace neat and tidy. Yes, it is your individual space to personalize and maintain as your own. But a messy workspace contributes to the overall atmosphere and feel of the office – especially if there are ten messy workspaces in a row. This is also a good tip to keep in mind for your own professional image; a boss, supervisor, or visiting client could assess you negatively based on a chaotic and disorganized workspace.

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TLOMA welcomes our readers to contribute relevant and timely articles.

CUBICLE CULTURE: ETIQUETTE IN OPEN OFFICE SPACES Continued..

Good conduct and presentation of your own workspace is a key contribution to the environment of the whole office. Equally as important in a cubicle layout is to be respectful of the individuality and boundaries of the workspaces of others. Even if cubicles do not have doors, you still should not simply barge right in. Without getting right into their workspace, try to knock on the cubicle wall or say, "excuse me." For a more extended conversation, especially if you know that a coworker is busy or does not want to be disturbed, try sending a quick email to ask for even five minutes to chat when it is a good time for them. This way, you show that you do not expect to speak with them immediately, and respect their workload and space.

An open-office or cubicle layout has the advantages of being cost-effective and community-oriented. And when colleagues acknowledge the proximity of this space and respect the workstations of others, these types of office environments are sure to function harmoniously.

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

By: Michael Warren

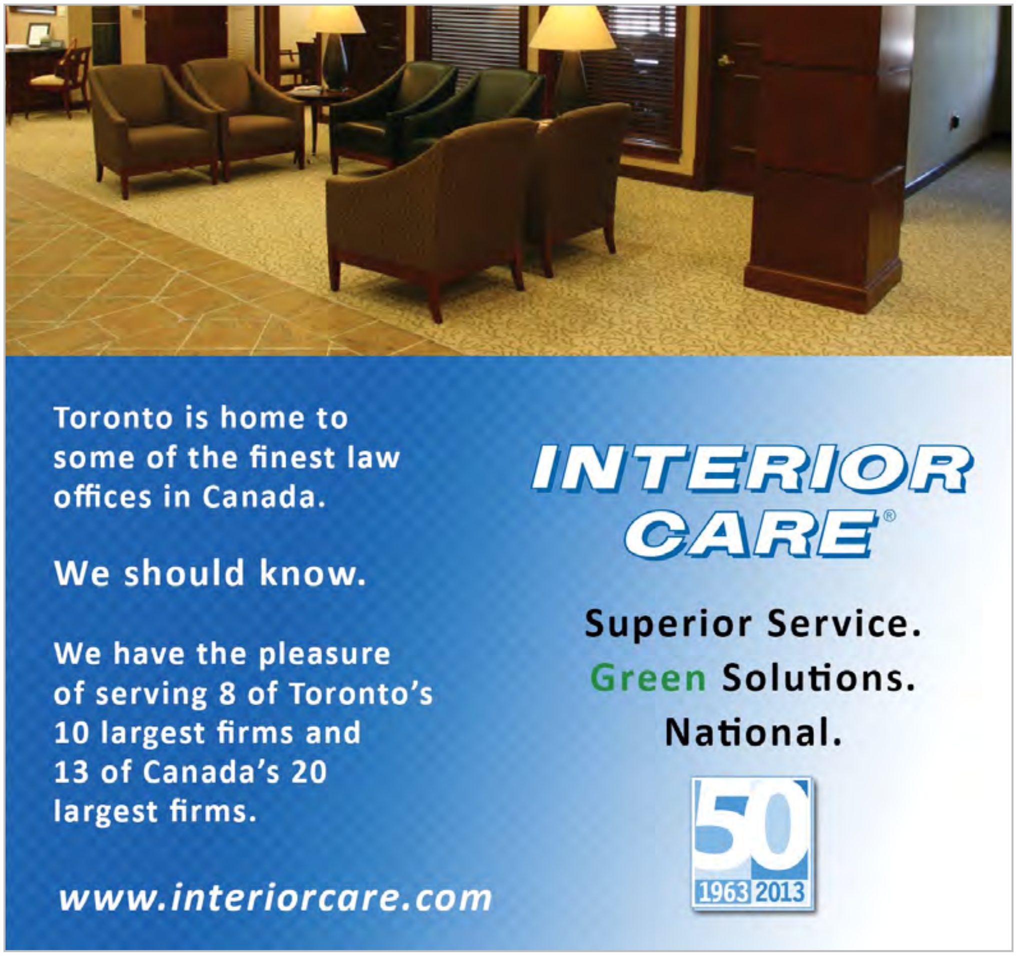
LIFE AFTER CASL MANAGING CLIENT DATA

What effects will the recent introduction of Canada's new antispam legislation have on a firm's ability to manage its business effectively?

In an increasingly competitive and internationalized global market, only one thing is really certain, change. Only those firms that can respond to change will survive. But as attitudes, laws and technology move on, do we need to completely re-invent the wheel or actually should we be increasingly relying on the principles of good business development and client communication?

Just because technology allowed us to "info'bomb" our clients did this really give us the right to do so? Surely it makes much more sense to provide clients with information they ask for in the manner that suits them best, even if that increasingly means, as marketers, we have much less control of our final audience?

We live in an era when legislation and client expectations are putting increasing constraints on marketers' abilities to communicate "at will" with large numbers of clients and contacts. CASL is already making



LIFE AFTER CASL – MANAGING CLIENT DATA Continued..

us re-examine the way we communicate.

Offering recipients of our communications an opportunity to "opt-out" from receiving them, will no longer be enough, we must have a robust and proactive strategy for soliciting their consent regularly and for implementing systems and processes to ensure that all members of staff understand the letter and the spirit of the law.

Of course, providing our clients and contacts with the opportunity to manage their own communication preferences is, in itself nothing new. The point of this legislation is to make the point that it is the recipient who is now firmly in control and not the sender.

But my question is, has this not always been the case? While the recipients may not have had the law on their side to prevent senders from engaging in unsolicited communication with them, they surely already had the power to simply ignore communications received.

The issue for firms was that while capital and operational costs of sending unsolicited email communications were just a fraction of those of sending hard copy, the negative impact on brand was more significant. Too many firms adopted the attitude that clients must want to hear what we have to say, without checking to find out if this was true, simply because the financial and operational barriers to communicating with them was removed with the arrival of emarketing technology.

CASL offers marketers an opportunity to re-acquaint themselves with the core principles of good client communication. I am not simply referring to marketing. I am talking about picking up the phone and talking to clients, engaging with them to understand their business concerns and challenges and then matching services and support to assist them to achieve their goals.

Studies show that the number one reason why clients stay with a firm is their ability to narrow the gap between the client's expectations and what they deliver. Engaging in meaningful dialogue rather than a marketing monologue is just an extension of this need.

Firms have adopted very different approaches to CASL compliance and managing client data. To learn more, please join us at the office of Norton Rose Fulbright Canada LLP for our November 13th TLOMA session on "Realizing the Full Potential of Your Client Data" moderated by Michael Warren with panellists Shannon Gilleland, CRM Program Manager at Stikeman Elliott LLP, Nitin Gambhir, National CRM Leader at Borden Ladner Gervais LLP and Jennifer Whittier, Chief Operating & Relationship Officer at Cole Valley Software, Inc.

Michael Warren is a CRM, Business Development and Data strategy professional. He has worked in the professional services market for almost 20 years. His firm, Stanton Allen, specialises in assisting professional services firms to define, implement and succeed with practical CRM and data management strategies that support their wider business development and growth objectives. He lives in London in the UK but travels extensively in Canada and the US to support Stanton Allen's international client base. For more information you can visit the firm's website at www.stantonallen.com or contact Michael directly at michael.warren@stantonallen.co.uk

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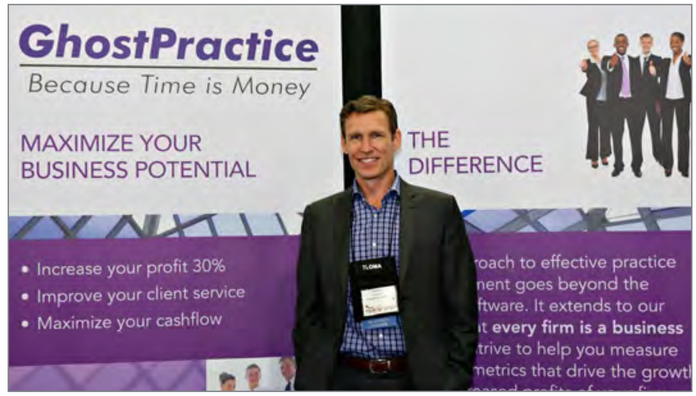

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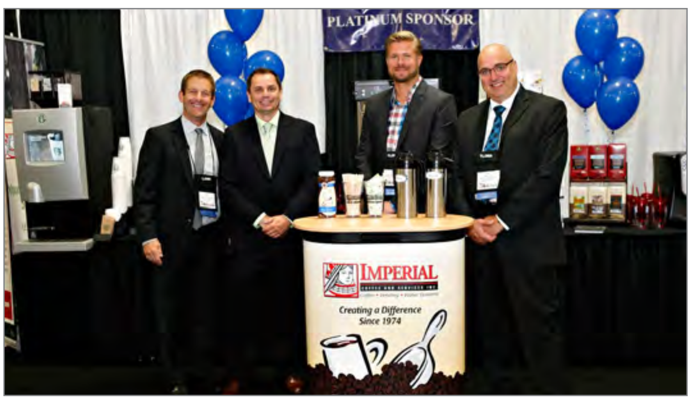

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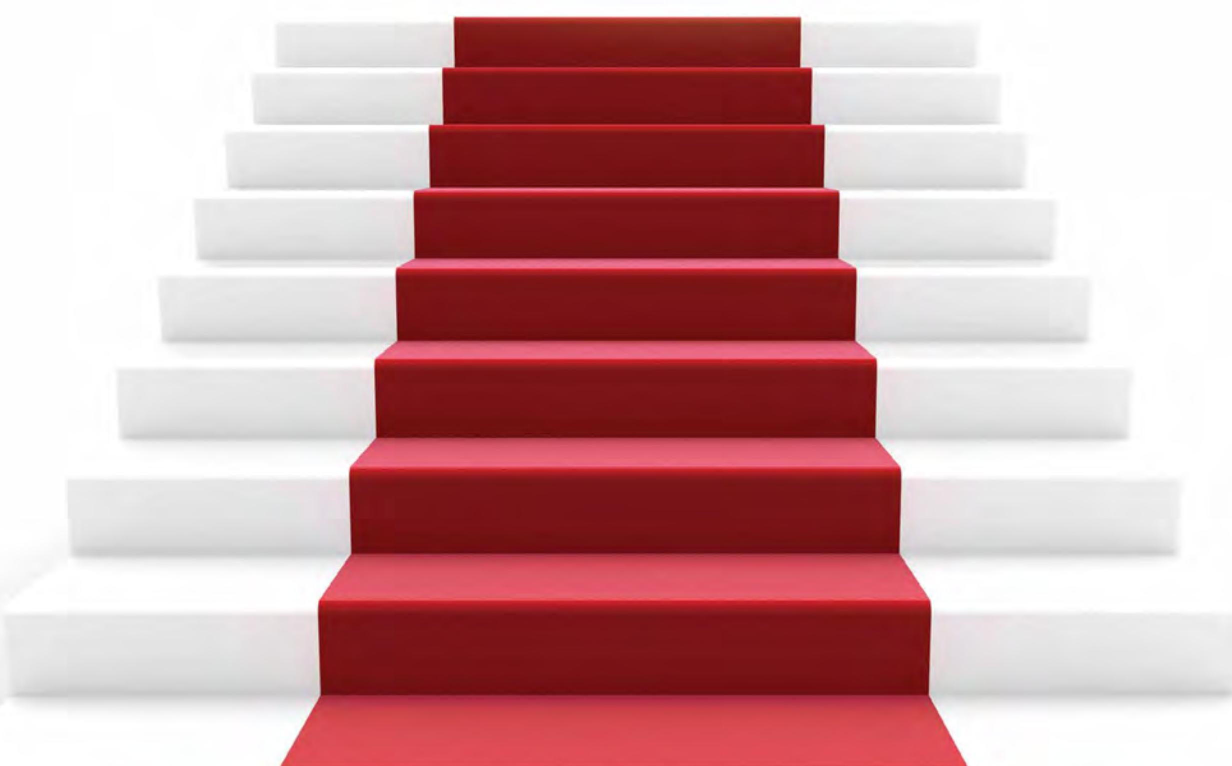

By: Lynn Foley

NON-LAWYERS SURVIVAL GUIDE

20 Tips for Working in a Law Firm

1. Make the lawyers' lives easier in respect to non-billable items.
2. Be known as a problem solver.
3. Don't make silly mistakes but own your work if you do.
4. Understand the culture of your firm.
5. Get to know the personality of your lawyers.
6. Find a partner champion for larger and/or new initiatives.
7. Ask what the partners expect of you so you can exceed their expectations.
8. If you're working with a lawyer for the first time, ask a colleague what to expect.
9. Try not to tread on the toes of your administration colleagues.
10. Be approachable.
11. Ask the lawyers how they want you to communicate with them.
12. Always get back to the lawyers to close the loop on your work with them.
13. Stay ahead of timelines – provide information before asked for follow-up.
14. Understand who "owns" the budget you are looking to spend.
15. Remember your firm is in business to make money and the partners own the firm.

16. Return on Investment (ROI) - Track it, Share it, Learn from it!
17. Get to know your colleagues in other departments – build your relationships.
18. Ask for an overview of the firm strategic plan. If you receive, read it.
19. Check your grammar and spelling - have someone proof your work.
20. Be responsive but set boundaries.

(20a – Just Breathe!)

Lynn Foley is a partner at fSquared Marketing, a marketing, business development and digital strategy firm that specializes on law firms. She is a Board Member of the Legal Marketing Association, Vancouver Chapter. For more information, email Lynn at lynnfoley@fsquaredmarketing.com. Website: fsquaredmarketing.com, Blog: blog.fsquaredmarketing.com, LinkedIn: http://ca.linkedin.com/in/lynnfoley, Twitter: @LynnFitzFoley

By: Shelly Edwards

SIX TIPS TO GREAT MOBILE CONFERENCE CALLS

With a touch of a screen or a few pushes on a keypad, workers can now join their colleagues in meetings from anywhere and any device, saving time and helping bring collaboration into the era of telework and flex work. However, mobile conference calls don't come without their own unique frustrations.

No matter the device, a conference call should be treated just like any in-person meeting, but attendees often use mobile conference calls to multitask even more than those at a desk or PC. Beyond email and online shopping, mobile users are also driving, ordering lunch and waiting for flights.

The probability of dropped calls, noise and distractions increases when you're dealing with road warriors, business travelers and other mobile users on the move. Plus, navigating a mobile device makes joining a meeting even more difficult, between switching applications and minding your surroundings.

More Users Choose Mobile Conference Calls

Despite all of these challenges, more users choose mobile conference calls every year instead of using a landline, and meeting hosts need to prepare for the amplified risks of mobile conference calls.

Your cutting-edge, mobile conference call doesn't have to turn into a frustrating, antiquated experience for attendees. A set of best practices for mobile conference calls will save the day and help mold your BYOD-happy firm into an effective mobile workforce.

SIX TIPS TO GREAT MOBILE CONFERENCE CALLS Continued..

Six Tips to Better Mobile Conference Calls:

1. Make it easy to join. Dial-in numbers and passcodes already pain users on a laptop or PC, but think about how much harder it is to find this information on a smartphone. To simplify the process, mobile dialers need a pop-up notification by calendar invite. For global workers, offer international toll-free access so it's easier to join without long-distance charges.

2. Make it easy to rejoin. Attendees on the move have a higher probability of disconnecting and won't want to rejoin your meeting by entering another maze of access information. Consider an audio conferencing app or smart calendar app that can provide users with contacts and easier meeting access. Instead of navigating between emails and memorizing call numbers, an app can provide one-touch joining.

3. Make it easy to hear. Encourage mobile users to go hands-free with a headset for conference calls. Not only does this improve sound quality but also makes it safer for those on the move. Also, unless your mobile guests are on Wi-Fi, discourage soft phones, which can have less reliable service and quality in weak coverage areas.

4. Make it easy to digest. Distractions plague mobile conference calls, and the absence of visuals can create difficulty for listeners following the conversation. Mobile attendees need to be able to cut through the clutter and digest your information, so limit your meeting to one main objective, shorten everything, emphasize key takeaways and review action steps.

5. Make it easy to engage. Many mobile users will be on the go, so you're more likely to lose engagement. Here, an email or app where you can share an agenda beforehand will help you stay on schedule so you don't lose them (or put them to sleep).

6. Make it easy to succeed. To improve mobile collaboration, create and share best practices and mobile etiquette with your team. You can integrate these guidelines with your firm's BYOD policy, send a brief reminder before meetings or host an employee webinar on mobile conference call best practices.

To execute these best practices, shop for audio conferencing solutions that offer multiple access points, a visual interface, easy dialing out for the host and simple entry for participants. With BYOD on the rise, such capabilities will practically be required.

Shelly Edwards has assisted many Canadian Legal Firms by streamlining and improving their collaboration both internally and externally with their clients. Shelly works for PGi, a leading provider of audio, video and web conferencing tools and services. She may be reached at shelly.edwards@pgi.com or visit pgi.ca for more information.

New **Members**

First Name	Last Name	Firm Name	Title
Tanya	Allison	Shibley Righton LLP - Windsor	Office Manager
Karen	Fernandez	Wood Gold LLP	Office Manager
Barbara	Fisher	Merovitz Potechin	Director of Administration
Gerry	Kroezen	Samfiru Tumarkin LLP	Office Manager
Judith	McKay	McCarthy Tetrault LLP	Chief Client Officer
Susanna	Trebuss	Rapley & Company PC	Business Manager

On the **Move!**

First Name	Last Name	Firm Name	Title
Linda	Ryan	Deloitte Tax Law LLP	Director, Legal Operations
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