Monday, October 20
4:30 pm-6:00 pm

303 Organization, Productivity, and Effectively Managing Workflow

Lisa Haas
Assistant General Counsel
Synergenics, LLC

Sarah Tuchler McElvaney
Senior Corporate Counsel
Deltek, Inc.

Scott D. Nader
Legal Counsel
AMEC

Ruthe Diane Wynne
General Counsel
A-1 Door and Building Solutions

Faculty Biographies

Lisa Haas

Lisa Haas is assistant general counsel for Synergenics, LLC, which finances and operates a portfolio of biotechnology companies. Synergenics, based in San Francisco, has international and US operations, with businesses ranging from Internet healthcare to antibody therapeutics, diagnostics, oncogene discovery, and GMO agriculture. Ms. Haas' focus is commercial and R&D transactions, licensing, as well as intellectual property and general corporate matters.

Previously, she served as a senior licensing officer for the University of California technology transfer program (Davis campus and system-wide office of technology transfer); and an associate at Brobeck, Phleger & Harrison. Before law school, she was a scientific researcher at The Rockefeller University in New York City, and a biotechnology company in San Diego, California.

Lisa received a JD from New York University, an MBA from the University of California, Davis, and an AB from the University of California, Berkeley.

Sarah Tuchler McElvaney

Sarah Tuchler McElvaney, senior corporate counsel at Deltek, Inc., a software company based in Herndon, VA, started her in-house career directly after law school. Her focus is licensing, contracts, and IP.

While in law school she was law clerk to the general counsel at BearingPoint, Inc., formerly known as KPMG Consulting following the spinoff from KPMG LLP. She took the lead in the name change from KPMG Consulting to BearingPoint, and after, focused on transactional matters and IP.

Ms. McElvaney earned a BA from the University of Virginia and a JD from George Mason University School of Law.

Scott D. Nader

Scott D. Nader is an Atlanta-based attorney with AMEC, a focused supplier of high-value consultancy, engineering, and project management services to the world's energy, power and process industries. As legal counsel, Mr. Nader is responsible for managing litigation and claims in the Americas and advises and counsels various business units in the US, Canada, and South America.

Prior to joining AMEC, Mr. Nader litigated cases in private practice with two international law firms.

Mr. Nader graduated from Brown University and served as an Infantry officer in the US Army.

Ruthe Diane Wynne

Ruthe Dianne Wynne is general counsel for A- 1 Door and Building Solutions, the largest door supplier on the west coast and ranked in the top-five nation wide. Her current duties involve all legal matters affecting her employer, with a focus on construction litigation and contract negotiations and management.

In addition to her legal responsibilities, she also serves as the government affairs advisor for her company and a leading trade association.

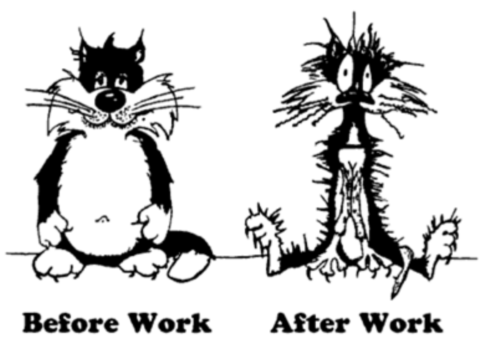
Organization, Productivity and Effectively Managing Workflow

- Lisa Haas
- Ruthe Wynne
- Sarah Tuchler McElvaney
- Scott Nader

Objective

The objective of this workshop is to introduce approaches, along with practical tools, to improve your organization, productivity and workflow management skills as in-house counsel.

Introduction

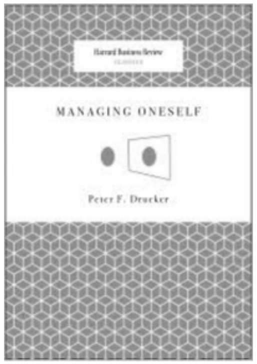


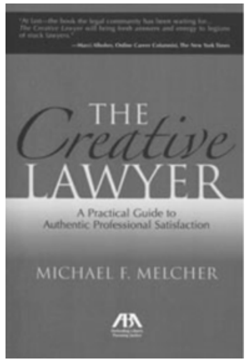
Dilbert: "Is there more to life than just work?"

Topics

- Self-assessment
- Time management & team-building
- Matter management
- Effective communications

Self-Assessment





Self-Management & Personality Type

- Myers-Briggs Type Indicator for lawyers
  - Extroversion v. **introversion**
  - Sensing v. **intuition**
  - **Thinking** v. feeling
  - Perceiving v. judging

Identifying Strengths & Values

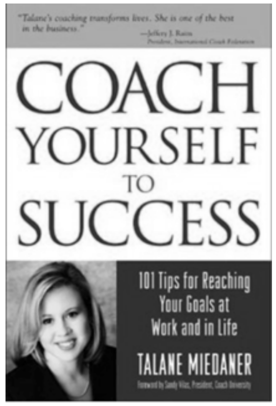
- Do you know your strengths? Are you sure?
- How do you perform?
- What are your values?
- Responsibility for work relationships

Self-Management Strategies

- Reclaim your job
  - Manage demands
  - Generate resources
  - Exploit alternatives
- Beware the busy manager
  - 90% of managers squander their time
  - Effective managers use **focus** and **energy**

Working and Living More Effectively

- Coach yourself to success
  - Track your time
  - Do complete work
  - Under-promise and over-deliver



Questions?

By in-house counsel, for in-house counsel.SM

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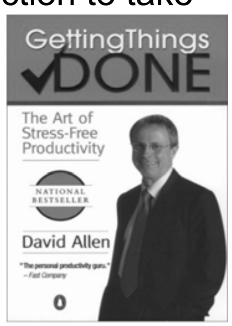
Mastering Workflow

- **Collect** items that require attention
- **Process** - decide what action to take
- **Organize** the results
- **Review** options
- **Do** the best option

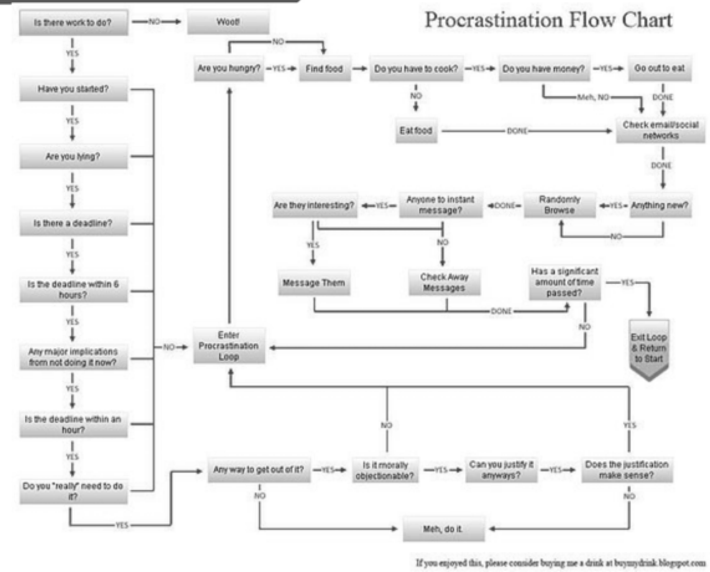


Time Management & Team Building

"Before we begin our Time Management Seminar, did everyone get one of these 36-hour wrist watches?"

Delegating

- Three types of tasks to delegate:
  - – Inadequate skill or expertise
  - – Those you do not want to do
  - – Easy to accomplish, but detract from value



Prioritize Tasks

- Procrastination…

Set Goals

- Goals are measurable, short-term objectives

Set Deadlines and Meet Them

- Deadlines help us manage time

Find Your Productive Time

- Each person has a time of the day in which they are best able to concentrate

Stay Organized

- Arrange your workspace
- Spend a little time each day maintaining
- Use a calendar or day planner

"Ms. Jennings, have you seen my 'ORGANIZATION IS THE KEY TO SUCCESS' poster?"

Minimize Stress

- Recognize what is causing stress
- Determine what part can be controlled
- Reduce physical effects of stress

Sleep and Exercise

- Tips to improve sleep
  - Physical exercise
  - Create an environment in a bedroom that reduces distractions; don't do work or watch TV in the bedroom
  - Make your bedroom as dark and as quiet as possible

Learn to Say No

- How does a person learn to say no?
  - Consider actual commitment
  - Decide if it is a good use of your time

Sleep and Exercise (con't)

- Go to bed and wake up at the same times every day
- Avoid caffeine late in the day
- Relax before bedtime by taking a warm bath or listening to soothing music
- Reduce worry at bedtime by writing a list of things to do the next day before going to bed

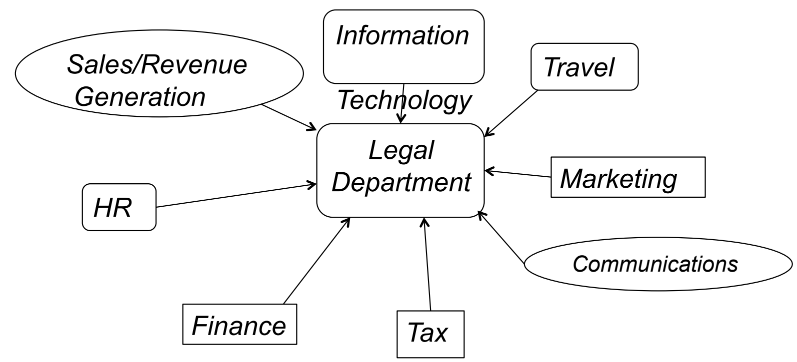
Learn to Say No (con't)

- To decline a request more effectively
  - Offer a reason for saying no
  - Be tactful
  - Suggest an alternative
  - Make decision as soon as possible

Reduce the Intrusion of Technology

- Communication technology can hinder ability to get work done

Matter Management



Questions?

Matter Management – What is it?

- The initiation, distribution, and status tracking of tasks handled by your department or group within a department

Needs Assessment

- Consider:
  - Types of matters needing to be managed
  - Level of customization or configuration
  - Security
  - Sarbanes-Oxley
  - Audit compliance
- Outside consultants to help with assessment?

Company Integration and Workflow

- Think through the steps:
  - How will a matter be initiated?
  - After matter is created, how is it assigned?
  - Who will update the matter?
  - What happens upon completion?
  - Does system need to integrate with others?
- What are your document retention needs?

Cost & Budget

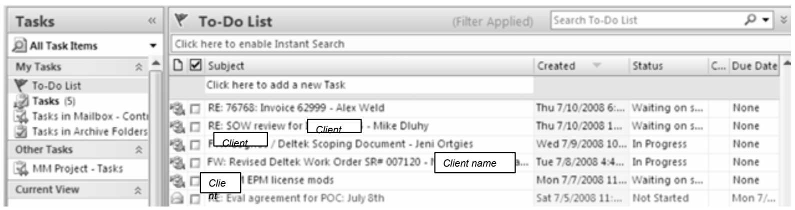
- Determine your budget
- List aspects of matters you'd like to see
  - $ value of matter?
  - Status?
- List essential qualities of system
  - Web-based?
  - Security levels?

Ready-to-Go Solutions

- Commercial Off-the-Shelf solutions (COTS)
  - Licenses & maintenance
  - Customization
  - Hosted software
  - Subscription-based services
  - More than you need?

Custom Solutions

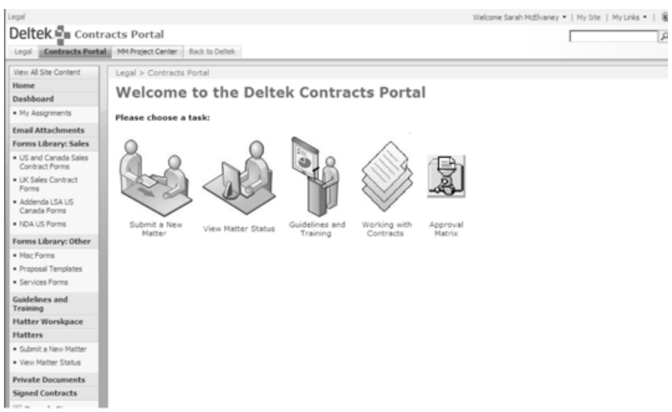
- Simple, organic solutions – See simple task list from Outlook below
- Considerations…



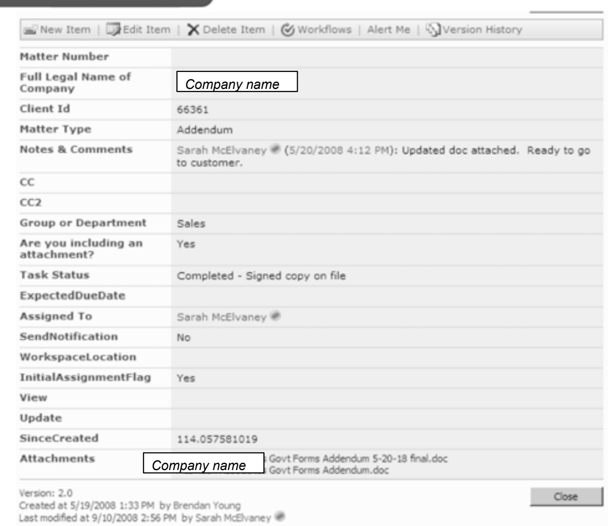
Sample Matter Intake Screen

Sample Homegrown System using Microsoft SharePoint

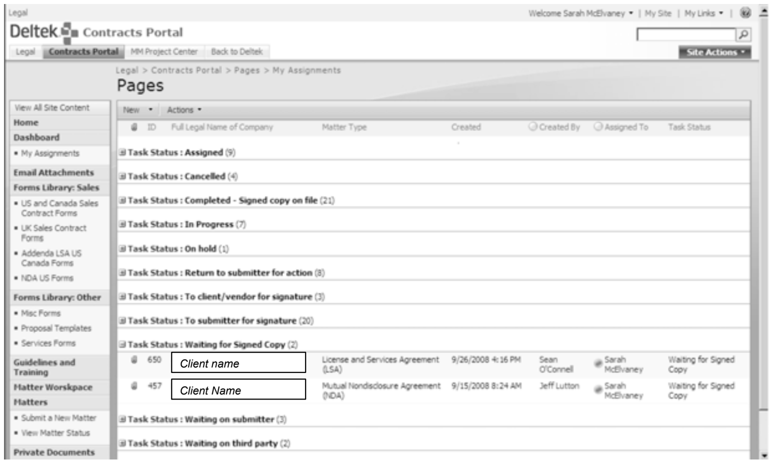
This is our internal Contracts Portal that has document libraries to the left; matter submission and viewing matter status are easily accessible via the icons.



Sample matter view



User “Dashboard”



Moving Forward – How to Guide

- Identify current challenges and growth areas
- Determine essential features
- Integrate with existing systems
- Only purchase the functionality you need
- Implementation & training

Learning from Experiences of Others

- Do your research!
- Think through worst case scenarios
- Include internal clients in planning
- Thoroughly scope out needs
- Solicit internal feedback
- Ask for and follow-up with references

Questions?

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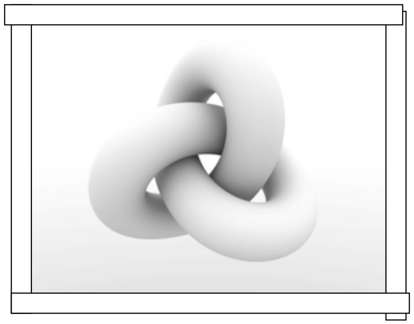
Effective Communications

- Tying it all together



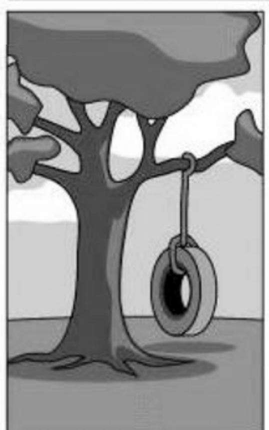
Types of Communications

- Internal
  - Examples:
    - Identifying goals and strategies
    - aligning processes with goals
    - inspiring employees
    - defining expectations
    - synchronizing external messages

Typical Example?

"I'd like you to build my son a swing for that tree over there.

It should be nice and comfy, with room for lots of kids to swing to their hearts content…"



What the customer really needed

Types of Communications

- Internal (con't)
  - Logical "Syllogism"
    - Given: Businesses seek to ⇑ Productivity
    - ⇑ Morale → ⇑ Productivity
    - ⇑ Communications → ⇑ Morale

      thus…
    - ⇑ Communications → ⇑ Productivity

Types of Communications

- External
  - Examples:
    - establishing a brand
    - marketing products and services
    - advertising & public relations
    - interface with consumer and customers
    - business dealings with clients

Communications Skills

- Must be able to both speak and listen
  - Most of us listen at 25% capacity
- Risks of failing to listen?
  - Disengagement
  - Malaise

Types of Communications

- Internal vs. External
  - Important differences

    yet…
  - Important commonalities
- Comprehensive communication strategy must address both!

Communications Skills

- Active Listening
  - Look for verbal & non-verbal clues
  - Indicate they are listening (eye contact, facial expressions, nods, body language, encouraging comments or questions)
  - Paraphrase the message mentally
  - Control their emotions; and
  - Respond when the message is complete

Communications Skills

- Effective Speaking
  - Pick an appropriate time and place
  - Make eye contact
  - Explaining why the message is important
  - Making it clear what you want from the listener
  - Indicate how long you intend to speak
  - Get to the point promptly

Harnessing Technology

- Heralded as *sine qua non* of productivity
  - Instantaneous communications
  - Message consistency
  - Leverage automation & search capabilities

- But technology merely amplifies existing corporate habits; it doesn't modify them

Harnessing Technology

Harnessing Technology

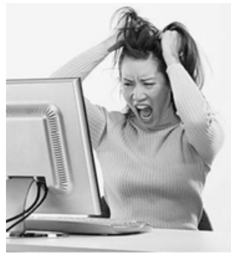
- Intranet
  - What is it?
    - glorified electronic library?

      or
    - communication and process tool?

  - Failures usually outweigh successes

Harnessing Technology

- Electronic Mail
  - Essential business tool?
    or
  - Bane of your existence?



  - Must control email, not let it control you

Cross-Cultural Communications

- Global Economy
  - International & interdependent markets
- Cross-Cultural Truism
  - Successful relationships ⇑ performance
  - Unsuccessful relationships ⇓ performance

Cross-Cultural Communications

Cross-Cultural Communications

- Marketing Blunders
  - “Moco” minivan in Chile
    - » “Booger or snot” minivan
  - “Wang Cares” in UK
    - » “Wankers…”
  - “GPT” merger in France
    - » “J’ai pêté” or “I have farted”

Cross-Cultural Communications

- Cultural Considerations or “Dimensions”
  - Geert Hofstede:
    - Power distance – inequalities between people;
    - Individualism – ind. vs. collective achievement;
    - Uncertainty avoidance – comfort w/ uncertainty;
    - Masculinity – traditional masculine work roles
    - Long-term v. Short-term – delayed gratification

Gender Differences

- Stereotypical Communication Styles
  - Attitude towards tasks and relationships
  - Processing information
  - Leadership style
  - Communication styles
  - Talk time

Gender Differences

Gender Differences

- Strategies to Bridge Differences (Women):
  - Stand up
  - Speak in bullet points
  - Eliminate “Feeling” Words
  - Don’t Turn Statements into Questions

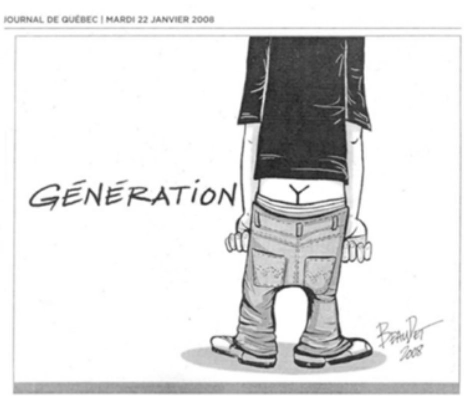
Gender Differences

- Strategies to Bridge Differences (Men):
  - Involve the Audience
  - Use analogies
  - Avoid Interruptions
  - Use body language to communicate

Generation Gap

- Generations defined
  - WWII (pre – 1946)
  - Boomers (1946 – 1964)
  - Gen-X (1965 – 1981)
  - Gen-Y / Millennials (1981 – present)

Generation Gap



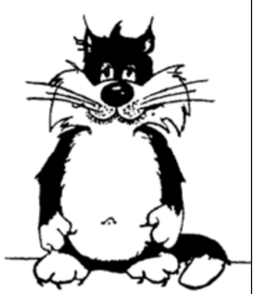
Generation Gap

- Myth or reality?
  - Annecdotal stories aside, data supports common drivers

Using Communication to Improve Productivity

- Workshops/Training
  - Communication → Morale → Productivity
- Technology
  - Manage email before it manages you
- Change your Corporate Culture
  - Embrace differences, open minds

Conclusion



After Managing Workflow & Productivity

Organization, Productivity and Effectively Managing Workflow

By Ruthe Wynne, Sarah Tuchler McElvaney, Lisa Haas, and Scott Nader

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Organization, Productivity and Workflow Management Skills and Tools

A recent ACC survey reflected that more than anything else, in-house counsel want to find some extra time in their busy day. This interactive "lessons learned" panel may help you meet that goal. It will focus on providing practical strategies for dealing with endless floods of emails, overbooked calendars, and disorganized documents, with the objective of improving performance, sanity, and quality of life. The attendees will come away from the session with ideas and tools to combat the ever present problem of "no time, no resources, no people."

The objective of this workshop is to introduce approaches, along with practical tools, to improve your organization, productivity and workflow management skills as in-house counsel. In the written materials you will find a sampling of many articles, resources, books and other tools we found helpful in increasing our productivity and organization. The article is organized into four sections: Self Assessment, Time Management and Team Building, Matter Management, and Effective Communications. Appendix 1 contains a list of resources cited or used to compile this article and Appendix 2 is a brief summary of matter management products. To jump directly to any section, click (or press Control when clicking) on the section title and the hyperlink will take you directly to the start of that section.

As corporate counsel we are often looked at as the person who can answer anything, solve anything and do anything, even when given no information regarding the situation in the first place. The book *Successful Partnering Between Inside and Outside Counsel* has this quote: "The ideal candidate of a small legal department is an obsessive compulsive workaholic, preferably celibate, and immune from all illness, highly intelligent, jack and master of all trades, highly organized yet completely flexible, computer literate, a team player and a self-starter, extraordinarily skilled at communication at all levels inside and outside the organization, with a sparkling personality and absolutely no desire for individual advancement, recognition or wealth." Although a bit exaggerated, this quote identifies the qualities needed to be successful in any corporate legal department, large or small.

What is usually lacking in all corporate counsel is more time. It seems the less time we have for ourselves, the more stress we encounter. With more stress comes anxiety. With anxiety comes less productivity. With less productivity comes less time. This is a vicious cycle that will replicate without a system to help improve your overall organization and well being.

To begin to implement an organization plan, several steps are helpful. The first step is a self assessment of your own style. Although it will take time and energy, the process will be worth it in the end. If you spend too much time implementing a system that does not work well with your own style or needs, it is less likely you will stay with that system and therefore waste even more time. Once you have determined your own style, begin to look at various strategies to set goals, prioritize, and delegate effectively. You may also want to implement a matter management system. And finally, you will want to improve your communication skills to effectively implement the systems you created. Most importantly, although we have researched many tools, books, and ideas, organization and time management is a personal process. What works for one Corporate Counsel won't work for all. Don't be afraid to start and try different approaches until you find a system that work best for you. We reiterate, the "best system" is irrelevant if you don't use it.

I. Starting from the Beginning: Self-Assessment

To become more effective, it is helpful to perform a basic self-assessment to understand our own strengths and weaknesses, how we learn, and how we work with others.

Identifying Strengths & Values

In the classic Harvard Business Review article *Managing Oneself*, Peter Drucker states that knowing your strengths helps you achieve results by doing what you are good at. Most people believe that they know their strengths, but according to Drucker are usually wrong. Drucker suggests using a feedback analysis to discover your strengths: "whenever you make a key decision…write down what you expect will happen…later, compare the actual results with your expectations." Over a period of time, this method will show you where your strengths are, if you are doing anything to limit your strengths, and areas where you have no strengths.

How do you perform? "How one performs is unique. It is a matter of personality." People achieve results by working in ways that they best perform. A few key personality traits usually indicate how someone performs. Are you a reader or listener? How do you learn—for example, by writing, talking, listening or reading? Do you work well with people, or are you a loner? If you work well with people, do you work best as a coach and mentor, subordinate, or team member? Do you produce results as a decision maker or as an adviser? Do you perform well under stress, or do you need a structured and predictable environment? Do you work best in big organizations or small ones?

What are your values? To be effective, your values must be compatible with the organization's. A value system includes ethics, and may include such values as whether a business should be run for short-term or long-term results, and whether to hire people from the outside or internally. If your values conflict with the organization's, you will perform poorly.

Responsibility for work relationships. To be effective, you also need to know the strengths, performance methods, and values of your boss and co-workers, which reflect their unique personalities. The secret to "managing" your boss is to determine how he works by performing the above analysis, and adapt yourself to what makes your boss most effective.

Drucker's paper provides valuable tools to identify how you perform, your compatibility with your current organization, and changes you can make to improve performance. Performing the analysis on your boss to identify how he works, your differences, and how to work more effectively with him, is also very valuable.

Self-Management and Personality Type

The Creative Lawyer by Michael Melcher, a career coach and lawyer, contains additional tools for self-knowledge to aid with having a fulfilling career. His book includes a section on identifying your values, and on self-management and type.

Melcher believes that your personality indicates the type of work situation you prefer and how you prefer to work. He applies the Myers-Briggs Type Indicator or MBTI, an established tool to look at personality type. The MBTI indicates which of the following sets of alternatives describe your mental processes: (1) extroversion v. introversion, (2) sensing v. intuition, (3) thinking v. feeling, and (4) perceiving v. judging.

Melcher applies the MBTI to lawyers, and provides extensive tips for each type, including work strengths and suggested practice areas. In the field of law, introversion, intuition, and thinking are the dominant types. In the general U.S. population, however, 'extroversion' and 'sensing' types dominate, with 'feeling' the dominant type for women (whereas most women lawyers are 'sensing'). The split for perceiving vs. judging in law is similar to that of the U.S. population.

Law in particular requires both introversion and extroversion, and intuition and sensing, even though people are dominant in only one type. Melcher provides tips, such as suggesting that intuitives, whose strengths are strategy and the big picture, should focus on getting the details right. (Attention to detail is a strength of the intuitive's counterpart: the sensing type.) It is a valuable exercise to determine your MBTI, and then read Melcher's chapter on it.

Self-Management Strategies

The Harvard Business Review is a great resource for articles on managing yourself. *Reclaim Your Job* states: "When managers complain about lack of time and resources, they're really expressing their fear of taking action. To overcome busyness, managers must adopt three strategies that will help them to operate independently." The three strategies are: (1) manage demands, (2) generate resources, and (3) recognize and exploit alternatives.

Manage Demands. It is "easier to fight fires than to set priorities and stick to them." Effective managers proactively control demands, which allows them to achieve strategic goals. To transform from a busy manager to an effective manager, develop a vision of what you want to achieve: for example, a General Counsel position. Developing a clear mental picture of yourself in that role encourages you to think in longer time periods of one to five years, rather than short periods of three to six months, and to develop long-term goals and priorities. Effective management requires taking control, not being accessible to everyone, and saying no.

Generate Resources. In addition to lack of time, managers may also have a shortage of people, money, and equipment. "Managers who develop a long-term strategy and attack their goals slowly, steadily, and strategically…can eventually win the backing they want."

Exploiting Alternatives. "Effective managers don't operate in the context of individual tasks or jobs but in the much broader context of their organizations and careers." They try to initiate and develop opportunities to accomplish the strategic goals of their company. During phases of major change, "[e]ffective managers…seize the opportunity to extend the scope of their jobs…and pursue ambitious goals."

Another article, *Beware the Busy Manager*, asks: "Are the least effective executives the ones who look like they are doing the most?" The authors found that "90% of managers squander their time in all sorts of ineffective activities." The managers who are effective use a combination of focus and energy.

Focus is concentrated attention, or "the ability to zero in on a goal and see the task through to completion." Focused managers are not in reactive mode and do not "get sidetracked from their goals by distractions such as e-mail…and unforeseen demands."

Energy is the "vigor that is fueled by intense personal commitment." Aware of the value of time, purposeful managers (in contrast to busy managers) manage it carefully. They are skilled at finding ways to reduce stress and refuel their inner reserves.

Working and Living More Effectively

While there are a lot of great resources on how to work and live more effectively, we found two to be particularly helpful.

Coach Yourself to Success by Talane Medaner provides an approach to be more effective through a ten part program of tips that build on each other. Here are a few selected tips:

- **Track your time.** If you can't figure out what is happening to your time, track it for one week in 15 minutes increments from the time you get up until you go to bed. This is especially valuable to see how much time we spent on e-mail, the internet, and other breaks. The act of having to record time on the internet becomes a deterrent to surf the internet and other time wasters.
- **Do complete work**. Do complete work on a project before moving on to the next one. If you set aside a project before completing it, you may have to spend significant time coming back up to speed. Therefore, when possible, work on a project when you have the time to complete it.
- **Under-promise and over-deliver**. You can build a reserve of time by under-promising and over-delivering. To under-promise, give yourself twice the time you think you'll need to get something done. To over-deliver, complete the project ahead of the promised date and submit it early.

In *Getting Things Done*, David Allen, a productivity expert, goes into detail about how to manage time and tasks in today's age of multitasking and overload. His five stages to master workflow are: (1) *collect* items that command your attention, (2) *process* or decide what action to take about them, (3) *organize* the results, (4) *review* options, and (5) *do* the best option. Many people fail at getting organized because they try to do all five phases at one time. Alternatively, people may *collect* or capture items by making a list, without deciding what action to take for lower priority items. The open loops on such items take up energy (for example, keeping you awake at night) and prevent you from focusing on what is important. The book explains the five phases in detail, with a step-by-step program for implementing a system for each phase, with many examples and best practices.

II. Time Management and Team Building

Once you have determined your best style it is time to incorporate those skills and management styles into action. As lawyers, we not always the best managers and delegators. However, corporate counsel are increasingly looked to as management and not legal staff. Our roles differ from traditional law firms, where there is usually a set staff and a managing partner or administrator. Corporate counsel usually have to manage their own workload and the team under them as well as the legal matters of many other departments. Most of these departments do not have any legal training. Being an effective manager can help you become more organized and in turn help create more time for personal goals and improve your quality of life. Marcia J. Simmering, associate professor at Louisiana Tech University, has written an article outlining the basic fundamentals of time management, delegating, prioritize, organization, and reducing stress. Her main ideas are summarized and outlined below. (See Appendix 1 for more information.)

Delegating

Many of us attempt to accomplish tasks that can be easily accomplished by other employees of the company. By delegating a task, you can have more time to accomplish other important tasks. There are three types of tasks that are best suited to being assigned to someone else: (1) tasks for which you do not have adequate skill or expertise, (2) tasks that you do not want to do but that others might, and (3) tasks that are easy to accomplish but detract from your value to the organization.

First, if someone else can do something more effectively than you can, you will spend too much time attempting to do it yourself. Most GC can count the number of times the CEO or VP comes in and hands you a "problem" and says fix it. Although we want to ensure we are experienced and skilled in most aspects of our legal field, we can not be experts in all areas. Knowing when to ask for outside help can often save time and the company money. The cost analysis of hiring outside counsel can be weighed against the time you will lose doing brand new research. A good example, when faced with layoffs, a 401K administrator asked if the company needed to report the layoffs as a partial plan termination. Not being an ERISA expert and unfamiliar with this area, the GC began to do basic research and then called an outside firm who agreed to meet for a free one hour consult. The parties agreed the GC would prepare a brief general analysis of the background and law. The outside firm was able to use the GC's limited scope analysis and have a junior associate prepare a memo at a lower hourly rate and at minimal hours. The General Counsel then applied the junior associate's legal guidance to the specific facts of her company. Combining the outside counsel services with those of the GC saved both money for the company and time for the GC.

Many times there are tasks that we find mundane as attorneys and therefore put off. This procrastination leads to not working effectively. Many tasks can be assigned to other employees who would welcome a change from their daily tasks. Sometimes discovery responses can be best answered by other people. Give them the questions and requests for the first draft. Allowing others to help with work provides a better team atmosphere.

A final situation where you should delegate is if there is an easy task that takes little skill to accomplish. For instance, if you are sending a mass mailing, it is poor time management for you to stuff the envelopes yourself, since an assistant or secretary can do this. By allowing this person to do a task that is easy to complete, you are freed to complete other tasks that require more skill and attention. Since the person to whom you have delegated this task is likely to complete it just as effectively as you, there is no drawback to delegating the task.

Prioritize Tasks

Procrastination, or putting off a task that must be completed, is common, even in business environments. Procrastination occurs for many reasons: you may not know where to start on a task, you may not understand a task, you may dislike the task, or you may worry that you cannot complete a task successfully. Often a person's anxiety about a task leads them to avoid it. Therefore, to accomplish more in a workday, it is best to tackle the most difficult or worrisome task first. This is a beneficial because it allows you to devote the time and mental energy that is necessary for a difficult or unpleasant task when you are most able to. Furthermore, by reducing the anxiety associated with this task in tackling it early, you will find that work becomes easier. When the unpleasant task is finished, it no longer creates anxiety and worry, which can save time.

If a person leaves unpleasant or difficult tasks until shortly before their deadlines or until the end of the workday, he or she will have less energy to complete it. Additionally, the anxiety and dread associated with completing the procrastinated task may affect a person's ability to complete other tasks throughout the day. The negative emotions associated with the anticipation an unpleasant task is likely to distract a person from the other tasks that they are trying to complete. This can make even easy tasks more time-consuming to complete.

Set Goals

Setting goals can be very effective to meet workplace demands in a timely manner. Goals are measurable, short-term objectives. Simply by setting an appropriate goal, you can better organize your day or week. Decades of research have supported the effectiveness of goal setting on performance in a variety of tasks. However, for a goal to be effective, it must be designed properly by being specific and difficult. Specific goals are much more effective than non-specific goals, because your progress can be assessed. For instance, setting a goal to read 20 pages of a report is a good goal because you can determine whether or not it was accomplished. If your goal was to "read a lot of the report" then you might determine 5 pages into it, that you had accomplished that goal, when in reality, you had not read enough. Goals should also be difficult, but not too challenging. A goal that is too easy, such as "respond to one e-mail today" are not motivating because they present no challenge at all. Overly difficult goals (e.g., "improve my sales by 50 percent in one month") are also not motivational; they are so challenging that a person may give up too soon, realizing they will never reach the goal. In addition to being appropriately specific and difficult, you are more likely to reach goals to which you are committed. A lack of interest or commitment in reaching the goal makes the goal-setting process futile.

One advantage of setting goals to improve time management is that, over time, you gain a more realistic understanding of what can be accomplished in a workday. People who do not often set goals may not be aware of what their capabilities are; however, those who have set goals more consistently have a good idea of which goals they have been able to meet and which were set too high or too low.

Set Deadlines and Meet Them

Some people thrive when working under deadlines. Newspaper reporters operate each day with a set of firm deadlines. However, many other people find deadlines to be daunting and stressful. Deadlines are set to help us manage time. By always meeting deadlines, or even by meeting them early, you can appropriately manage time. If you complete deadline work early, you reduce the stress associated with your schedule, and you have more self-confidence about completing work tasks. Additionally, a person's work is likely to be higher quality if deadlines are met; attention to detail can suffer when a person is hurrying to finish a project. To meet your deadlines early, you can break larger tasks into smaller ones and prioritize them. In addition, setting interim deadlines before a final deadline can help you to set goals and to make a large and seemingly unmanageable project seem easier to complete. Finally, tackling more difficult tasks first, as described previously, may increase your ability to meet deadlines.

Stay Organized

Organization and time management go hand in hand. Many people waste time looking for documents, messages, or other information necessary to complete tasks in a timely manner. There are a number of steps that can help you stay organized. First, arrange your workspace in a way that promotes organization. That is, have a place for everything, and put everything in its place. If you do not have a specific location for telephone messages, it is not surprising that you might spend time looking for a telephone message or even misplace one. Additionally, put the items that are most used closest to you. If you use a reference book (such as a dictionary or a computer programming language reference book) frequently, putting that book across the room wastes time. You want to minimize the amount of time you spend getting up from your desk retrieving or looking for items.

A second suggestion for staying organized is to spend a little time each day organizing your work-space. Discard paper and electronic documents that are no longer needed, file documents that will be needed at a later time, and write a to do list for tasks that must be accomplished that day or the next day. Some time management experts suggest that you only touch each piece of paper in your office once. That is, if you receive a memo, you should read it when you receive it and take action based on it only once, rather than reading the memo, putting it down, and having to reread it several times before acting on it.

A third suggestion it to use a calendar or day planner to stay organized; this will help you to remember important dates and deadlines. Without a calendar in which such dates are noted, some tasks or meetings may be forgotten; instead of planning the time you need to do certain tasks, you may have to drop everything to accomplish a task that must be done for a meeting that you forgot was later that day. For a calendar to be effective for time management, however, you must be sure to note important dates. An incomplete or inaccurate calendar is useless. This suggestion fits nicely with the recommendation to spend a little time each day organizing your workspace. If part of your organization effort includes documenting any important dates and times and reviewing events on a calendar scheduled fro the following days, this can aid time management.

Find Your Productive Time

Each person has a time of the day in which they are better able to concentrate or to do certain types of work. And, most people have a time of the day in which they have difficulty staying focused and getting things done. Some people are very productive in the mornings, but less able to concentrate in the afternoons. Others cannot tackle difficult tasks in the morning and prefer to wait until later in the day to do work that requires attention to detail. By determining when you are best able to do certain types of tasks, you can schedule them throughout your day so that you are most productive. For instance, if you are able to read and evaluate best in the morning, schedule those tasks for when you first arrive at work. If you find yourself getting sleepy in the afternoons, then reading quietly is not the best task for this time of day. Instead, you may choose to do tasks that involve a little bit of physical activity or that do not require as much mental concentration. Perhaps returning telephone calls or meeting with co-workers is better for afternoon tasks.

By scheduling tasks during the times of day when you are best able to do them, you are likely to be able to complete your work in a more time effective manner. Many people waste time trying to concentrate or solve difficult problems by doing so at a time that is ineffective for them. Re-reading a memo three times because you lack concentration in the late afternoon is a poor choice when you could read the memo once in the morning.

Minimize Stress

Stress is a major barrier to effective time management. Stress created by the workplace or by personal concerns can create anxiety and worry that are distracting from work. Even ineffective time management can lead to stress, since anxiety over completing tasks in a timely manner can hinder their accomplishment. To manage stress, it is important to first recognize what is creating the stress. Is it worry over a particular task, a work situation, or an issue at home? Once the stressor is recognized, it can be better managed. If the source of stress is unidentified, then it cannot be managed.

Once the source of stress is identified, you must determine which parts of the situation can be controlled and which cannot. For instance, if the source of stress is a looming deadline for a project, tackling some elements of that project or scheduling some of the tasks may relieve stress. However, there may be parts of the project that are causing stress that cannot be managed. For instance, if part of the successful completion of the project depends on the work of another person, this may create stress that cannot be controlled unless you have some ability to monitor the work of the other person. For stressors that are out of your control, you must either find ways to exert more control or to ignore the issue and focus on those tasks that you can control.

Sleep & Exercise

Even when stressors have been identified and controlled to some extent, you may still experience stress. To reduce stress physically, you can get an appropriate amount of sleep, exercise regularly, and eat properly. Many Americans are sleep deprived, and skipping even a couple of hours of sleep each night can have noticeable consequences in the workplace. Some sleep experts liken working while sleep deprived to working while drunk. Although many people think that they will get more done by working more hours and sleeping less, getting appropriate amounts of sleep can instead make a person more productive during their working hours, requiring less time on the job. Here are some suggestions for improving sleep:

- Create an environment in a bedroom that reduces distractions; don't do work or watch TV in the bedroom
- Make your bedroom as dark and as quiet as possible
- Go to bed and wake up at the same times every day
- Avoid caffeine late in the day
- Relax before bedtime by taking a warm bath or listening to soothing music
- Reduce worry at bedtime by writing a list of things to do the next day before going to bed
- If you are in bed but cannot sleep, get up and do something boring until you are sleepy

Physical exercise can also reduce stress. Sports and other fitness activities can reduce a person's resting heart rate and blood pressure, which can help to alleviate the negative effects of stress. Many people forgo physical activity, believing that time invested in exercise will detract from a person's ability to complete other tasks. However, much like getting proper sleep, even minimal physical activity can make a person more effective during working hours due to decreased stress and anxiety.

Learn to Say No

Most often as in-house counsel we are not able to say no to the CEO or our superiors. However, many of us struggle with time management because we have too many obligations both within or work place and outside. Saying yes to people who make requests can feel good, but not having time to accomplish tasks can be a letdown to the person and the organization. So, often times, saying no to a request is a better option than taking on a task for which there is not adequate time. Therefore, knowing the right time to decline a request is important.

How does a person know when to say yes or no to a request? First, you must consider what the actual commitment is; that is, how much time, effort, and energy it will take. If you do not fully explore the possible commitments required by a certain request, you may be agreeing to do something that takes much longer than you originally anticipated. Second, you must decide if agreeing to the request is a good use of your time. If you compare the proposed commitment to your normal duties, which is more important? Those tasks that have very meaningful outcomes may be worth agreeing to do even when time is limited.

Even when a person knows that they do not have the time available to say yes to a new commitment, saying no can be difficult. To decline a request more effectively, you should do four things. First, offer the person a reason for your answer of no. If you do not provide a good reason to decline the request, then others may assume that you are lazy or selfish. Second, be tactful when you turn someone down because the denial may make him or her angry or hurt. Third, suggest an alternative that takes less time. By giving the requester another option, such as a different employee who might do the task or another time when you can help, you show that you want to cooperate, while still protecting your time. Finally, tell the person "no" as soon as possible. By asking for time to think over a decision when you know that you will decline their request, you may cause more problems or even find yourself obligated to say yes.

Reduce the Intrusion of Technology

The availability of communication technology, such as e-mail and cellular telephones has done much to improve the ability of Americans to get work done. However, communication technology can also hinder your ability to get work done. Employees now have many interruptions while trying to get work done. If you find that the arrival of a new email message or the ringing of the telephone is interrupting your work, you may choose to ignore them. If you are able to postpone speaking with people or responding to email messages, it may be helpful to set aside a time period that is communication free. For instance, you might decide that from 1–3 p.m. each day, you must concentrate on getting specific tasks done, and during that time, you will not take calls or read e-mails. It is important, however, after this period of no communication to respond to work-related messages received during this time period.

Now you have established a protocol to organize, prioritize and delegate. You have started to develop good habits for your own work space and have begun implementing an organization system that works best for your style. You have made your to do lists and you have begun to work with other departments and employees. But how do you effectively track those tasks, who has been assigned, where is it in the process and has it been completed? Assigning and delegating can create more stress if you can not readily answer these questions. The stress can reduce effectiveness and productively. This can create more cumbersome work than if the tasks were done by yourself in the first place.

Many tools are now available to help with what is termed Matter Management. We provide a brief summary of this area, which is becoming increasing vast. At the end of our written materials is an outline of the major systems available and information you may find helpful for each one.

III. Managing Your Workload with Technology: Matter Management

Matter management is a term that vendors often pushed on in-house counsel groups, but what is it? It can encompass a multitude of things: it can mean a software system for managing tasks for an individual or it can be quite broadly defined to be a software system that helps a group keep track of their matters, e-billing, budget, workflows, staffing, automated contract creation, document management, and filing. For purposes of this discussion, matter management focuses on the initiation, distribution, and status tracking of tasks handled by a department or group within a department.

Needs Assessment

As in-house counsel, whether you need a matter management system depends largely on how you work, who you work with, and your volume of work. Whether or not it will increase your efficiency, effectiveness, or level of organization is also up to you. The size of the group or department whose matters will be managed should be taken into account. The larger the group, the more likely the needs will be diverse and a more complex system will be required. Don't forget to consider language/character capabilities if you are an international law department.

The first step is to consider the *types* of matters that you seek to manage. Consideration of the types of matters can help you determine which system may work best for you. Routine transactions handled by your group are well suited for a matter management system. For some this will be contracts supporting the revenue of your company (such as sales or services contracts); for others, the bulk may be contracts to support your company's infrastructure (sales, HR, marketing, IT, etc.). You may also wish to track IP matters: trademark or patent applications, questions on copyright, and reviews for patent infringement. Some in-house departments will also want to track litigation or collections matters. Long term projects are not as well suited for matter management systems. While these matters can be logged (e.g. "due diligence for XYZ acquisition"), the status changes will be infrequent, although the multitude of tasks required for long term matters could be tracked within the matter details.

As the volume and variety of a department's matters increase, matter management tools can help. The benefit of a matter management system for a department is the insight the department manager or General Counsel may have into who is handling what -- and how much -- work. A system is especially effective if there high staff turnover or high collaboration among members. Other important considerations in the deployment of these systems are the level of customization or configuration the software offers, security (whether the software can be installed behind corporate security and firewalls or if the software is only hosted as an Internet-based application) and whether or not the deployment methodology meets Sarbanes-Oxley and audit compliance mandates.

Not surprisingly, there are consultants to guide you through the needs assessment process. Most vendors will offer services for consultation, customization, data conversion, installation, and training. For an objective needs assessment, it's better to go with a consultant that is not associated with a single product. For the other services, the selected vendor might be the best resource.

Cost and Budget

One of the top questions regarding implementation of a matter management system is how much it will cost. As with most projects for which there are a multitude of vendors, the cost depends on how much you have (or are willing) to spend and how much functionality you are seeking. You need to determine a budget to get a realistic picture of what options will be available.

After evaluating the matters to be managed, consider what aspects of your matters you would like to see in a system. Matter management systems can either include or be integrated with other functionality, such as document management, calendaring, budgeting, and tracking outside counsel expenses, to name a few. There are also some features of a system you may wish to consider, such as email tracking (storing emails relevant to a matter with the matter), Web accessibility, and visibility by interested parties such as other legal department members or outside counsel. There may be other aspects that are important to you. Creating a comprehensive list can help you rule in or out certain COTS (commercial off the shelf) vendors. A lot will depend on how your specific department works in terms of collaboration.

Company Integration and Workflow

It is important to consider early in the process how the matter management system will fit into your department's overall process. Think through steps from the perspective of both the requestor (matter initiator) and the person to whom task is assigned. Consider how the matter or request for action will be initiated (Via email? Via intranet website? Will the matter be initiated in another system?). After the matter is created, it must be assigned to someone to follow up on the request. Next, someone should be responsible for updating the matter status. Finally, consider what happens for each type of request when Legal has completed the matter. A signed copy may need to go to records storage unless the system provides access to all who may need access to signed copies. Consider whether your company keeps originals or is comfortable with electronic copies. The final document may need to go to Finance or Billing and once countersigned, a copy needs to go back to the other party. Closed litigation matters may need to be stored differently. A completed IP matter (such as a trademark registration) should be clearly labeled as such.

For completed matters, determine whether there will be a need to review the matter and details in the future based on matter type. Are drafts important to your group? It will depend on your business and possibly the matter type. Document retention can also be managed automatically within a matter management system. You may want to keep only signed copies and have all drafts self delete after a certain period of time. No matter what, you'll want to be sure the system is backed up and is factored into your company's disaster recovery plan.

Ready-To-Go Solutions

There are many COTS solutions available (see table in materials for more information on a small sampling). They range the gamut in price, options, and complexity. There is likely something available to meet your specific needs if you determine your group will benefit from a matter management system. Of course there are budgetary options to consider. Some vendors will offer a perpetual license with annual maintenance, which will result in a higher upfront costs (license fee) but with smaller annual maintenance amounts (usually around 20% of the license fee). This cost usually will not cover any necessary hardware, implementation, configuration or customization of the software which will be loaded and managed on your systems. Warning: customization is expensive and the customizations are usually <u>not</u> supported under a maintenance plan.

These same vendors may also (or instead) offer hosted software, sometimes known as software as a service, which is hosted by the vendor and usually obtained on a subscription basis. Subscription-based services may still require some implementation and may also need to integrate with other systems depending on what your department needs. The type of solution implemented will determine how much support will be needed to keep the solution up and running, and whether such support will be delivered by internal (IT) staff or the vendor – or both. These ongoing support costs need to be factored into the overall cost of the system.

Don't overlook simple solutions you may already have to get started. These may be very rudimentary but are inexpensive, require little set up, and do not require any budget allocation. For example, you can create a centralized e-mailbox for matter intake (we called ours "Contracts Group"), and instructed our primary customer to submit matters or requests to the centralized mailbox with as much information as possible and the relevant attachments. From there, our administrator checks the matters for completeness before setting each up as a Microsoft Outlook task and assigning each to a member of the group. This allows tracking of to whom each matter was assigned (using the search feature of the Contracts Group task list), and, if the matter is appropriately updated, the status. Microsoft offers the default status options as: Not Started, In Progress, Completed, Deferred. Once the task is assigned, it appears on the personal task list of each group member, so a group member can go to his task list to see the matters assigned to him. Each group member is responsible for updating the tasks on her list.

Simple solutions such as this have their limitations and may or may not get you where you need to be. They probably do not have capability to store email or manage documents. They are, however, great for a small department with a lot of matters to track, and they can provide some insight in the volume and types of matters your department is handling. In fact, this type of solution could help a department identify its tasks and volume and provide a preliminary assessment of its matter management needs. The less development, the less support and budget is required.

Custom Solutions

If you cannot find a system that fits your needs and/or budget, you could look into development of a custom solution. A custom solution could be based on different platforms, based on software your company may already have or is comfortable supporting. Custom solutions are tailored to exactly what you're seeking, so you are not paying for functionality you do not need or do not plan to use. However, support and updates may be an issue since the application would have to be supported by internal IT staff or an outside vendor. Any new functionality will need to be custom-developed.

Learning From the Experiences (Mistakes) of Others

Implementing a matter management system can take a considerable amount of time and effort (and budget!), and if not implemented properly or in line with expectations, can lead to disappointment in a system that falls short of your needs. Poll your colleagues. Do your research. Consider and include your internal clients in the planning stage. If successful, a matter management system can give the entire company or department insight into how much your group is handling. It can increase efficiency by allowing you to avoid reinventing the wheel and promote consistency when you are able to find and re-use documents, concepts, or language handled on a matter in the past. It can decrease the time it takes to find matters pertaining to a particular product or client. It can also give you data to support staffing or budget increases.

Make sure to scope out your needs thoroughly before selecting a vendor or beginning development of own product. Sometimes you may find after selection that you have to make compromises to make do with your selection. For example, while developing a solution based on Microsoft SharePoint, we are finding some deficiencies in automation processes for creating and assigning a new matter. But because we are too far down the road to turn back, we will be effectively increasing the number of steps our administrator must take to assign each matter. While we are getting what we want, an unanticipated cost is the increased work of one group member because the platform does not support the type of automation we'd like to see.

The feedback from other departments is essential and should be sought early in the process. This may increase the time to get your project rolling in the beginning, but it will speed adoption and support of the application. For example, the legal department in one company developed a system that worked great for Legal but it was not tied to the system used by Finance; as a result there was confusion over matter number issued by legal vs. client matter ID issued by Finance. Furthermore, end users were supposed to send signed copies of contracts to BOTH Legal and Finance but typically only sent the signed copy to Finance since, process-wise, they could not begin work on the contract until Finance issued the client matter ID and there was no incentive to send the document to Legal. Consequently, Legal had a hard time moving matters in to the status "Completed – signed contract on file," and to track down the signed contract we had to ask the requestor or Finance for it. Had Finance and Legal coordinated development of their respective systems, signed documents could have been sent once, to Legal, and Legal could have developed a system that indicated to Finance when a signed contract was received and provided Finance access to signed documents.

There is no substitute for experience. When selecting a vendor or product, ask for references and spend some time with those references asking what they would have done differently or where they see missing functionality. If developing your own solution get early input from your customers on their experience with these types of systems or what they'd like to see. Our customers said they would like better insight into the status of their matters, so that's a feature that we added into our SharePoint system.

Moving Forward – A Short How-To Guide

Once you've decided to move forward, have determined your needs, and worked with stakeholders and other departments, you're ready to select a system. Make sure you have identified your current challenges and growth areas so that your system addresses those. Determine which features are essential and make sure you have mapped out how the system will fit within your organization. With all these bases covered, you're ready to compare available alternatives using your criteria and budget.

Pricing will be easier to determine on COTS solutions, but ask for pricing on only the functionality you need. Vendors may try to sell you on an all-or-nothing approach, especially if their system is not modular and you must buy all or nothing. If you cannot find what you are seeking or the budget numbers are not working, engage your internal IT staff or a consultant to begin discussions on a custom-developed solution. These solutions may take longer to build and of course there are no references, but you will be getting a solution that you know fits your needs and current IT architecture.

Once the plans are drawn and you know what your system will look like, it's time to begin implementation. Discuss an adequate roll out time with your implementation team (which may be an internal or external team) so that you set expectations properly with the stakeholders and your superiors. This may seem obvious, but make sure rollout does not coincide with a busy for your department or company such as yearend, quarter end, your annual user conference/trade show or holidays. Gather a pilot group of all types of users (requestors, remote and local, assignees, administrators, etc.) for feedback to tweak your system. Do a short training for the pilot group and plan for a couple weeks to see how it works. In the meantime, have a plan in place for training and rollout company- or department-wide. Be sure to incorporate comments and feedback from the pilot group into the system and the training for the broader rollout.

Expect your ACC colleagues to ask about your selection, implementation, and your satisfaction with the overall process. If you are so inclined, join an ACC committee or panel for the Annual Meeting and share your experiences!

IV. Tying it all together: Effective Communication

Now that you have done your self assessment, developed your own system to improve your organization, and implemented a matter management system, how do communicate to accomplish your set goals? Underlying this discussion of productivity is the common denominator of communication skills. To ensure your business is as productive and profitable as possible, you must have an effective communication strategy.

This is particularly salient in today's "do more with less" business environment. As companies find themselves working with fewer and fewer resources to compete with more and more competitors on what is often a global scale, they must find the most cost-effective methods of using their employees to achieve success. And one of the most cost-effective means to leverage employee productivity is through improved communications.

Studies have long linked employee morale as an influential driver of company productivity. Corrie, (28 August 2006) "Teambuilding in Organizations: Communication and Productivity." It is clear that employee productivity is directly related to employee morale, or job satisfaction. And one of the easiest ways to improve employee morale, or job satisfaction, is to maintain open lines of communication. Thus, companies that communicate effectively are more productive.

Types of Communications

In the broadest sense, business communications can be divided into internal and external communication. Establishing a brand, marketing products and services, advertising, public relations, interface with consumer and customers, and business dealings with clients and other companies are all examples of external communications. Internal communications can be more subtle. Identifying goals and strategies, aligning processes with goals, inspiring employees, defining expectations and providing specific direction, and synchronizing external messages are all examples of internal communications.

Each type of communication is important to maximize productivity and there are important differences between them. You wouldn't, for example, want to rely solely upon marketing materials to explain the new roll-out of platform "X" to your employees. Nor would you necessarily want to communicate your market strategy and internal goals to a client or competitor. But despite some obvious differences in message and delivery vehicles, there are important commonalities between external and internal communications to consider when crafting your communication strategy.

Communication Skills

Perhaps one of the most important of these commonalities is the recognition that communications – regardless of type – are dialogues and not monologues. In other words, whether you are communicating with external shareholders or internal management teams, you must be able to both speak and listen. Yet for many of us, it is this latter category that needs the most attention. Studies over the past two decades, for example, consistently demonstrate that most of us listen at about a 25% level. Wallace, Marie. (5 July 2000), "Guide on the Side – Listen Up – Communications Depends Upon Learning to Listen," (citing a 1998 study from the US Department of Labor and the American Society for Training and Development that ranked "listening" as the second most important skill required for the development of the American worker). In other words, we are missing 75% of the message people attempt to convey to us. Conversely, this means that others miss the point of what we communicate three out of every four times.

This failure can seriously affect productivity. Not only is there the obvious consequence of miscommunicated directives and goals, but also the more insidious risk of disengagement or malaise; for when employees no longer feel that their peers and/or supervisors are listening to them there is little incentive to reciprocate. Fortunately, most organizations today recognize the value of effective communications and train their employees and managers on it.

Active Listening. Listening is not the same as hearing. Hearing is the passive process of registering sound. As Marie Wallace points out, listening requires the recipient to not only hear the content of the message, but to also understand its context and applicability for future use. This is a conscious, active process. Beware of obstacles to active listening and bad habits many of us unknowingly share and employ to defeat effective communication: (1) since humans can listen at twice the speed that the average person speaks, be aware of the natural tendency for your mind to wander or anticipate the message; (2) be careful not to pre-judge the speaker and/or dismiss the content of the message; (3) often, what someone says will ignite ideas in the listener's mind, sending them off on a tangent of unrelated thoughts; (4) and, since multi-tasking has virtually become the norm in our society, doing only one thing can feel uncomfortable; (5) talking over the other person, or interrupting to tell a similar story that happened to you once; and (6) offering unsolicited advice; perhaps the speaker simply wanted someone to listen…

Instead of falling into common traps, an active listener must remain engaged throughout the process. Active listeners: (1) look for verbal and non-verbal contextual clues with both their eyes and ears (e.g. is the message urgent? Is it highly emotional?); (2) indicate they are listening and understand the message through eye contact, facial expressions, nods, body language, encouraging comments or questions; (3) paraphrase the message mentally, focusing on key concepts and ideas; (4) control their emotions; and (5) respond when the message is complete, ensuring they understand what is required of them.

Effective Speaking. When you become a better listener, you become a better speaker. Once you understand the process, you know the obstacles listeners face and you understand what they want and need. Keys to effective speaking include:

- Picking an appropriate time and place where there are no distractions or interruptions;
- Making eye contact. Establish rapport and buy-in;
- Explaining why the message is important. Tell them what you are going to say and why;
- Making it clear what you want from the listener at the beginning – action, advice, support, sympathy, change in behavior, etc.;
- Indicating how long you intend to speak and getting to the point promptly.

Elements of Successful Internal Communications. Effective communication strategies involve aligning communications with the goals of the business. Since companies do not have a face, but rather an image that is delivered by its employees, it is vital that employees understand the company message and external communication goals. Successful communications such as these are generally:

- Succinct & Timely – focus on specific business strategy issue;

- Honest & Straightforward – anticipate and allow for dialogue;
- Timely & Personalized – contextualize & tailor message to recipient;
- Memorable – use medium recipient is willing and able to comprehend;
- Results-Oriented – specific and measurable outcome

But effective top-down, employer-driven brand messages are only part of a successful communication strategy. Linda Hopkins astutely notes that smart organizations recognize that employees will always talk to each other so it is better facilitate such discussions than allow them to percolate under the radar of management. Most professional management organizations and communications bodies consistently find that communicating with and listening to employees is a useful and powerful tool to engender greater engagement – the propensity of the employees to want to come to work and want to contribute to company success. To be committed to work, one must have ownership of the work. To have ownership of the work, one must be able to influence what goes on in the workplace. And to influence the workplace, one must feel that their company and management team will listen and reasonably answer one's concerns. See, for example, articles by Bennet Simonton and others.

In today's environment where employees can move from one employer to another with relative ease, it is in every company's best interest to retain their smartest and most productive employees. By communicating with these employees and listening to them, companies can improve productivity through greater engagement and retention.

Harnessing Technology

Another key means to improve productivity is through harnessing technology. Virtually all companies today have an Internet presence and most spend a significant amount of capital developing and refining content on their websites. These external communications are critical in presenting a company's brand and message, and there are few who doubt the return on investment (ROI) of these dollars spent.

Intranet. Many companies have also deployed some form of internal-internet (Intranet) to facilitate internal communications. Unfortunately, when it comes to realizing the ROI for these systems there are far more instances of failure than success, frustrating employees and management alike. For many senior managers, the challenge is to transform the Intranet from a glorified information resource into a business tool that translates into real, tangible, bottom-line results. One author, Paul Chin, identifies five common misconceptions regarding the Intranet that prevent companies from realizing these goals:

- Intranets should share a similar purpose (and brand) as external Internet;
- Internal security is not as important as external security;
- Building is cheaper and easier than buying;
- More features = More value;
- The company Intranet will improve collaboration and communications

To begin with, the company Intranet should have an explicitly different brand than the corporate website, reflecting the different purposes of the two. Where an external website targets an audience seeking to learn more about a company, an internal Intranet is focuses on employees already intimately familiar with the organization. And whether the Intranet will facilitate communications (and thus, presumably, productivity) largely depends upon the existing state of the organization's social interaction. Technology is simply an enabler and if employees don't communicate and collaborate a the basic human level, adding a layer of technology will not transform those relations – if anything, it will only serve to drive them further apart.

Two other authors, Michael Rudnick and Patterson Shafer, point out that as companies attempt to transform their intranets from glorified electronic libraries into "second generation" communication and process tools, they must first consider the value proposition. In other words, how does the organization define and achieve value with web technology? Can the company align the Intranet to meet specific objectives? How does it determine ROI or measure success?

The main business advantages of an Intranet, Rudnick and Shafer argue, lies in streamlining business processes, facilitating information dissemination, and enriching communication and collaboration throughout the organization. The key is identifying those mission-critical applications that lend themselves to such a platform. According to one consultant quoted in their article, it is not unlike undertaking any major strategic initiative. You start with the strategic plan, which may include as many as five or six objectives, that aligns the Intranet with the strategic goals of the organization or division it is designed to support. Then you break down the key objectives into more granular and measurable sub-objectives and diligently align the Intranet to support specific objectives and measure its contribution or success in support of each. While this will obviously vary from organization to organization, successful Intranets do share similar traits:

- Consistent user-interface, reflecting organizational culture;
- Retain identity as a key enabler, within this framework;
- User-centered design, focused on helping people do their jobs;
- Start small – focus on facilitating decision-making among common workgroups;
- Improve work processes, rather than simply add another layer of technology

Electronic Mail. Another aspect of technology that virtually all companies employ to facilitate communications and improve productivity is e-mail. But anyone who has spent any degree of time pruning their in-box recently will certainly question the productivity side of the equation. While most of us acknowledge e-mail as an essential lifeline connecting us to our colleagues, clients and friends, simply keeping up with volume can become a tremendous drag on productivity.

Productivity coach, Stever Robbins, believes the problem is one of burden-shifting. Back in the Stone Age of say, 1988, the sender of a document used to bear the burden of correspondence (e.g. "is it worth 25¢ for John to see this?"). With e-mail, however, it is the reader who now bears the burden. For example, if you receive 25 emails a day that each require 3 minutes to read and respond to, then you spend over an hour each day reading email. And for many people, this is a conservative estimate! We cannot eliminate email, of course, but we can apply the two principal approaches to improving productivity in electronic communications. First, we can train recipients how to efficiently read and respond to e-mail. And second, we can train senders in our organization to re-assume the burden of quality control.

There are many techniques to tackle an overflowing in-box, but most require recipients to block off time to read e-mails and then take decisive action on each one. Your in-box should not be a to-do list, nor should you use e-mail to manage content. Instead, set up sub-folders and move e-mails to an appropriate spot. Denise Landers recommends the mnemonic device, "R-A-F-T," or (1) Read, (2) Act, (3) File, (4) Toss, in order to process all types of mail (electronic or otherwise) that comes across her desk:

- Read – either (a) casual FYI reading, or (b) items to read with an accompanying action item. Once read, the latter items should be dragged to a task list.
- Act – Drag to task list, asking oneself "What is the next step? When will I get to it?"
- File – items without actions can be filed into (a) temporary working files, (b) permanent project or job files, or (c) reference files.
- Toss – Everything else! Be liberal with the delete key, particularly for non-project related items.

Other ways to improve email efficiency include perfecting the art of brevity (e.g. "Good idea. Please purchase.") or using MS Outlook's draft and delayed send features to insert a pause into the conversation. This allows events to unfold and can prevent the author from getting too far out in front on an issue. And perhaps more importantly, it also affords the author an opportunity to reflect upon the correspondence before sending it.

For senders, most important advice is to slow down! You should consider not only the content (contain only one point, proof-read, non-emotional), but also the subject-line (clear & concise, specific, make the reader's job easier) as well as the addressee (tailored, specify response required from each). Stever Robbins and others recommend the following tips to improve email efficiency:

- ***Use the Subject Line to Summarize the Message*** – because most people scan their inbox by subject, use the subject line to describe the content of the message ("ACME bid due on Friday, send comments NLT Wednesday")
- ***Contextualize Your Answer*** – instead of just answering a question, restate it first. This prevents the recipient from having to read a long email chain to find out what has been asked ("Mark asked who should be invited to conference. All PMs should attend")
- ***Individualize Your Cc: with Action Items*** – instead of blindly copying the world on your email, tell each reader why they should care or what is required of them ("Mary – please respond. Luke – Do we have enough widgets to support? Peter – FYI")
- ***Edit Forwarded Messages*** – edit forwarded messages to eliminate unnecessary links in the email chain and to ensure they are appropriate and/or do not contain embarrassing comments ("You'd better ask Dick first thing in the AM before he hits the links…")

Cross-Cultural Communications

In today's global market, many argue that a company's success is ultimately dependent upon the degree of its international expansion. Effective cross-cultural communications can greatly assist this expansion effort. Any company that has successfully penetrated other markets realizes the benefits of understanding and addressing the unique characteristics of each market. Successful companies must not only overcome the obvious language barriers within a new market, but also equip their managers with the skills to build strong working relationships with subordinates, associates, and clients, many of whom who have vastly different cultures and points of view.

Unfortunately, the converse is also true. Ineffective or non-existent cross-cultural communication can adversely affect company performance. Consider the following commonly-cited examples of failing to communicate effectively the local market: (1) Automobile dealerships in Santiago de Chile urge Nissan to rethink it's Moco minivan concept because the word "Moco" in Spanish refers to "snot" or "booger;" (2) Wang Computers struggles to understand the lack of response to its "Wang Cares" marketing campaign in the UK; or (3) the 1988 merger of General Electric Company and Plessey Telecommunications results in new company, "GPT." This failed to impress the French who pronounce G-P-T as "J'ai pêté" or, "I have farted."

While these examples largely turn on simple translation errors, other, more subtle, cultural differences can affect communications. In a landmark study, *Culture's consequences: Comparing values, behaviors, institutions, and organizations across nations*, Dutch sociologist Geert Hofstede collected over 100,000 questionnaires from IBM offices in over 72 countries and identified five distinct "cultural dimensions" that he argued affected cross-cultural communications:

- Power distance – reflecting the extent to which a culture accepts and perpetuates inequalities between people;
- Individualism – focusing on the degree to which a society values individual versus collective achievement;
- Uncertainty avoidance – concerns the level of acceptance of uncertainty or ambiguity within a society;
- Masculinity – the degree to which a culture reinforces traditional masculine work roles
- Long-term v. Short-term – the extent to which a culture encourages its members to accept delayed gratification for material, social, or emotional needs;

This data is flawed (is country-based, for example, rather than cultural-based) and is certainly dated, but it provides an important foundation for cross-cultural communication assessment. Acknowledging and recognizing differences in these key areas can go a long way to establishing effective communication and its corresponding increase in productivity. Other communication factors cited by consultants from Echo International are (1) whether a culture has a direct or indirect communication styles, (2) what type of negotiation styles the two cultures at issue employ, and (3) what type of leadership styles employees expect.

For those who are new to cross-cultural communication, it is often helps to:

- Observe and ask questions. Be inquisitive and polite;
- Allow for more time in almost all activities. Consider traveling early to acclimate;
- Look for individual differences; avoid the temptation to stereotype;
- Learn to tolerate uncertainty;
- Find the humor and connect on a personal level.

Gender Differences

Other differences can create barriers to effective communication, particularly what many consider to be stereotypical gender differences. A recent article by Kathleen Tucker reminds us that despite new data indicating that the number of female General Counsels in the Fortune 500 has more than doubled since 1999, women continue to be proportionally under-represented in the legal profession. This disparity is less pronounced in the general business environment, but can still result in communication difficulties between those who haven't or won't consider different communication styles.

Communication Styles. Men are generally considered to have different communication styles than women. Neither style is superior to another nor is it unique to each gender. But organizations that are most aware of these differences are best positioned to create an effective dialogue between different communication styles, regardless of gender. Generally speaking, most people acknowledge at least some of the following differences between men and women. See, for example, articles by Simma Lieberman, and Linda Hazelton, which identify:

- Attitude towards tasks and relationships – women tend to be more relationship-oriented and accomplish tasks by building relationships. Men tend to be more task-oriented and build their relationships while accomplishing the task.
- Processing information – Many women tend to process and look at options out loud while men tend to process internally until they come up with a solution. Women can perceive men as being unresponsive to suggestions while men can perceive women as looking for approval.

- Leadership style – Due to their focus on relationships, women tend to lead by consensus. Men tend to be more hierarchical and limit the circle of decision-makers.
- Communication styles – Women will often nod their heads to show they are listening. Men tend to interpret this as agreement and are often surprised to learn that the woman doesn't agree with them at all. Conversely, when a man listening to a woman remains quiet with neutral body language, some women interpret this as boredom or an inability to understand her message. This might cause the woman to repeat herself or ask the man if he understands. This in turn, could be interpreted as a lack of confidence or assertiveness by the man.
- Talk time – contrary to many stereotypes, studies have shown that men talk far more than women and that women's turns in speaking are not nearly as long or as frequent.

All these differences can lead to miscommunications as members of one sex make assumptions about why members of another sex act or communicate as they do. These miscommunications can result in team breakdown, a loss of good ideas, and sapped productivity.

Strategies to Bridge Differences & Value Diverse Styles. Clearly, each gender has a stake in understanding how and why the other communicates. At the end of the day, clients want results and in-house attorney does himself or herself a disservice by refusing to acknowledge the validity of other communication styles. Just as we would make allowances for a non-native English-speaker, those who make an effort to understand other communication styles are well on their way to improving productivity of their organization. And, depending upon your audience, it may be effective to adopt certain communication styles that resonate with your audience.

Simma Lieberman suggests that women speaking to predominantly male audiences, for example, may want to consider:

- Standing up – This subconsciously communicates self-confidence and power;
- Speaking in bullet points – Begin by outlining your agenda and setting a timeline, including breaks if appropriate. This allows your audience to know what to expect and indicates the speaker is in control;
- Eliminating "Feeling" Words – Change "I believe this product will…" to "This product will…" so as not to invite disagreement. Men may often interpret this conversational style as a sign the speaker is not sure of herself;
- Not Turning Statements into Questions – Women tend to use an upward inflection at the end of a sentence that transforms it into a question. This communicates lack of confidence.

Conversely, men speaking to predominantly female audiences may want to consider these communication techniques:

- Involve the Audience – Depending upon your subject-matter, it may be useful to ask questions or solicit anecdotes from audience members;
- Use analogies – Explaining concepts with non sports-related analogies can help listeners understand the message or draw parallels to their own experiences;
- Avoid Interruptions – Whether you invite a question or whether it arrives unsolicited, be prepared to listen and address the audience concerns without cutting them off;
- Use body language to communicate – eye contact, nodding all convey interest. Avoid the male temptation to stand stoically by while your audience talks.

Generational Gap

A final area of discussion is the so-called generation gap. Anecdotally, almost everyone has a story of some uppity whippersnapper or the doddering office curmudgeon. And who among us hasn't heard those old saws, "Back in my day," or "When I was your age." According to a recent article in the ABA Journal, "In-House Counsel See Generation Gap," different generations in the workforce have vastly different perspectives on authority, tradition, and the use of technology.

Generations Defined. The generation gap largely refers to people born in the post-WWII era. Among the groups, Judy Welles, identifies the following traits:

- WWII (pre-1946) – tend to automatically respect authority and eschew technologies such as e-mail. The silent generation, believe in mantra "no news is good news."
- Boomers (1946 -1964) – once bucked authority, now embrace it. Prefer formal, top-down feedback and communications.
- Gen-X (1965 – 1981) – Skeptics who are not intimidated by authority. Accustomed to instant, peer-to-peer feedback, believe there is not enough workplace communication.
- Gen-Y / Millennials (1981 – present) – impatient with authority, dual-centric work/family focus. Tend to favor electronic communications over in-person meetings.

Myth or Reality? In reality, however, the generations are far more aligned than many give them credit for. Recent studies have shown that generational differences in drivers of employee engagement are not as wide as initially perceived. According to Watson Wyatt's *WorkCanada*™ *2006/2007* survey of more than 3,000 employees, the leading drivers of employee engagement include management's ability to demonstrate leadership and strategic direction that builds confidence in the prospects for long-term corporate success; effective reward programs; and frequent, clear two-way employee communication. See Table 1, below.

Table 1. Employee Engagement Drivers by Age Group

Age Group	#1 Driver	#2 Driver	#3 Driver
Under 30	Strategic Direction /Leadership	Rewards (pay & benefits)	Communication
30-39	Rewards (pay & benefits)	Strategic Direction /Leadership	Communication
40-49	Strategic Direction /Leadership	Rewards (pay & benefits)	Communication
50-59	Strategic Direction /Leadership	Rewards (pay & benefits)	Communication; Training & Development
60 and over	Strategic Direction /Leadership	Rewards (pay & benefits)	Communication

This data is supported by Jennifer Deal's US survey of more than 3,200 employees between 2000 and 2005 which found that essentially all the generations value the same things, they all want respect, and they want trustworthy leaders who will coach them. Curiously, the author noted that where the generations differ is how they perceive being respected.

Using Communication to Increase Productivity

There may not be as many barriers to effective communications as we think. Just as many generations share the same drivers and values in terms of job satisfaction, so to many men and women, and many cultures across the world. For the organization seeking to improve productivity, this should be encouraging. One needs to be aware of how to improve communication techniques, but the challenge is less in the execution of the strategies themselves and more in the identification and planning of them.

As organizations attempt to leverage employee productivity through improved communications in today's "do more with less" business environment, there are a host of tools available to them. From listening and communication workshops, employees and managers can learn how to actively listen and avoid missed messages. This will permit them to engage employees and build morale, across all generations of workers. By harnessing technology, companies can use their internal networks to share information and business processes to more efficiently do their jobs. Similarly, managers can train themselves and staff to use electronic mail more effectively, cutting down on lost time in the workplace. Finally, a conscious effort to build international, cross-cultural and cross-gender communications can help companies thrive in both emerging markets as well as existing ones.

Conclusion

We have learned that improving your organization, productivity, and workflow management is a process. You can improve by learning about yourself and how you work, and actively trying to improve your efficiency by continually learning and building on tools and approaches. We have provided references to some excellent tools, resources, and examples to get started. We hope you find this useful.

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Appendix 2: Matter Management Solution Providers

The following are the industry's leading matter management providers (*Note: The following list is from Simpson Neally's website http://www.simpsonneely.com; the info about each product was compiled from each vendor's website. No particular product is endorsed by Simpson Neally or the authors*).

Company: Bridgeway Software, Inc.
Product: eCounsel
www.bridge-way.com
	Matter Management
	with eCounsel® from Bridgeway
	• **Stay informed**
	• **Cut costs**
	• **Reduce risk**
	• **Do more with less**
	eCounsel is a premier matter management software solution designed specifically for high performance legal departments. eCounsel allows secure real-time access to your legal matters anywhere, anytime via the Web. With eCounsel you can track legal matters, assign staff, evaluate outside counsel performance, analyze trends and manage your legal spending.
	TECHNOLOGY THAT WORKS!
	• Store all matter information in one central secure location
	• Track and analyze costs, and e-mail reports
	• Customize screen views, reports and access
	• Maximize your matter management investment with Bridgeway's training program
	MANAGE STAFF AND OUTSIDE COUNSEL
	• Run a report and review your current workload distribution
	• In-house counsel see everything, unless restricted by role
	• Outside counsel see selected information regarding their assigned cases
	  • Limited access to modules
	  • Only active matters on which they are an active player
	  • Limited tabs & fields within assigned matters

Company: Economic Analysis Group **Product:** CaseTrack www.case-track.com	**CaseTrack is a complete matter management solution for in-house legal departments.** Whether it's generating status reports, monitoring budgets, staying on top of critical dates or managing legal spend through electronic billing, CaseTrack gives you complete control and ready access to the data you need to build an organized, informed, and responsive legal department. **A solid foundation for matter management** For the past 15 years, CaseTrack has served as the application of choice for many of the top in-house legal departments, including some of the most well-known companies in the Fortune Global 500. You can't ask for a better foundation than that.
Company: Corporate Legal Solutions **Product:** Case & Point www.caseandpoint.com	Streamline the process! Specify a location and expertise, and see you how you rated your outside counsel. Then select the appropriate outside counsel for a new matter and automatically generate an engagement letter. Case&Point software is designed by corporate attorneys for corporate attorneys to manage all types of matters, outside counsel, and increase efficiency and productivity. Case&Point v6.5 introduces two revolutionary new concepts in legal software: the Virtual Legal Desktop™ and Optimized Legal Workflow™ to provide the best user experience of any matter management software. Corporate Legal Solutions has been a premier provider of legal software solutions dedicated to the corporate legal department since 1988.
Company: CT, a Wolters Kluwer Company **Product:** CT Tymetrix 360 www.cttymetrix.com	**Matter Management** **http://www.cttymetrix.com/productsAndServices/mattermgmt.aspx** The CT TyMetrix 360° matter management suite provides a complete and transparent view of your entire matter portfolio. It is your single source for all case information and documentation for all practice areas and includes: matter profiles and details, important dates, documents, assessments, exposures, evaluations, predictions, issues, contacts, and notes. A good matter management system collects and organizes data and knowledge in the way that makes sense to your department. CT TyMetrix 360° allows you to organize and assess your current matters providing you with information to make better decisions. In a single space, you can collect matter information that can vary for each practice area and you can track all information related to the matter including tasks, documents, invoices, calendar events, matter team members, and budgets. The big difference in CT TyMetrix matter management is the configurable tool set that allows you to decide what information to collect and how it should be organized at the practice area level. This flexibility gives you a complete view of your department's matters, from litigation to intellectual property to mergers and acquisitions, across all business units.

Company: Law Manager, a Bridgeway Company **Product:** LawManager Enterprise www.lawmanager.com	For Corporate and Government In-house Legal Departments Developed to meet the needs of the in-house legal department, LawManager Enterprise is a flexible yet comprehensive information management system that includes all of the functionality needed to meet the rigorous demands of today's corporate and government agency business environments. LawManager Enterprise systems offer a full spectrum of customization options. Clients can deploy a system out of the box with minor adjustments and modifications, or the system can be extensively customized to match the specific needs of individual applications and users.
Company: LT Online Corporation **Product:** LAWTRAC www.lawtrac.com	LAWTRAC products have been assisting in–house corporate law departments of all sizes since 1984. Our products enable in–house legal departments to increase responsiveness to company stakeholders, enhance the quality of departmental work product and improve transaction outcomes. General counsel, attorneys, paralegals and administrative staff have counted on LAWTRAC to provide crucial information at the desktop. LAWTRAC is used to manage litigation, contracts, claims, intellectual property, labor/employment and environmental matters, including receiving invoices over the internet, predicting budgets, managing documents, and sending inter–office messages. LAWTRAC is user configurable, and easy to learn and use.
Company: TrialNet. **Product:** TrialNet Matter Management www.trialnet.com	In the legal arena, accuracy of information and speed of its dissemination make all the difference. If you have the ability to quickly organize, track and manage any and all information related to individual cases or matters, you can greatly improve your position. **That's exactly what TrialNet's Matter Management platform does.** By creating a single case file that can be accessed quickly and easily by members of the corporate legal team and outside counsel, information flow is greatly enhanced. All parties involved with the case can access, review, and contribute to the file instantly - improving their ability to work the case while reducing costs through increased efficiency. **Our Matter Management platform provides:** » Matter Creation & Assignment, allowing new matters or case files to be opened, assigned, and organized into subfiles of your choosing; » Matter Management Tools, including document management, secure e-mail, calendaring, reporting and automatic notification functions; » Outside Counsel Collaboration, enabling counsel to contribute directly to your case file, create status reports, manage witness information and documents, and track events; » Data Integration & Analysis, ensuring seamless integration with your own data systems to maximize use of your existing files and knowledge base; » Financial Data Integration, linking each matter to TrialNet's electronic billing platform for easy, efficient tracking of hours and costs associated with each case.
Company: Serengeti Law **Product:** Serengeti Tracker www.serengetilaw.com	Note: this product has many, many features – e-billing seems to be its flagship function. Below is the info on transaction monitoring (did not include info on IP or Litigation monitoring). To manage your transactions effectively, you need a system that organizes your team around a shared workspace and provides quick access to all of the resources they need. Once the work is complete, Tracker allows you to securely archive your documents and data for quick search and retrieval at a future date. Don't reinvent the wheel Get the most out of your prior work product by allowing law firms to access forms and other resources in one specialized "form file" matter. You can also build teams involving multiple law firms and business users who coordinate on a project or work independently and submit their work to single matter. Specialized Features for transactions Once a matter is underway there are a number of tools designed specifically for simplifying the process of managing transactions and deals: • **Fixed Fee Budgeting** Track spending against an approved fixed-fee for the matter and receive invoice audit alerts if spending exceeds that amount. • **Form File** Create matters to house the documents that you would like to share with your firms or business users. • **Deal Room** Invite all parties to a transaction into a secure matter where documents and data can be shared. • **Track Monetary Impact of Transaction** Solicit estimates of monetary impact (cost or revenue) of a transaction from your in-house and outside counsel and then compare it to actual results when the transaction is

	finalized. • **Task Assignment** Assign tasks to in-house or outside counsel with email alerts and deadline dates. Then track task completion using the individual matter calendar or the master calendar **There is a separate contract management feature:** Serengeti Tracker's contract management module helps companies track their contractual commitments, organize contracts and related documents and meet important deadlines. With Tracker contract management you can: • Organize contracts and related documents into customizable online files with controlled access • Search database fields for all contracts by parties, clauses, warranties, assignability, termination dates, notice provisions, and other important terms • Designate contracts by materiality, types, status, etc. • Track upcoming renewals, expirations, and other deadlines • Generate e-mail alerts to those responsible in advance of key dates • Track payments made or received under the contract
Company: Mitratech **Product:** Team Connect Legal Suite www.mitratech.com	 **Matter mgmt module:** Manage all legal matters including: disputes, litigation, and transactions. Integrates system silos to provide actionable information in management, regulatory, and operational reports. Manages litigation, compliance, and asset risk; and automates advice and counsel. Allows internal customers, business units, and outside counsel to strategically collaborate.

Company: Corprasoft, Inc., a DataCert Company **Product:** Corprasoft Legal Desktop (CLD) www.corprasoft.com	CLD is a powerful new integrated solution that enables corporate legal departments to take control of their legal operations. By combining two best-of-breed solutions - legal spend management and matter management, corporate legal departments have the ability to simplify internal processes and gain greater visibility into their legal spend. Using CLD, corporate legal departments can now manage legal spend and track volumes of documents and financial information related to legal matters. The integrated solution significantly streamlines law department collaboration while reducing the time lawyers spend on time-consuming administrative tasks. The business benefits from the integrated solution include the ability to: • Log-on to one system to approve invoices and track matters • Automate the enforcement of outside counsel guidelines • Track outside counsel legal spend and internal time spent on matters • Significantly reduce turn-around time on invoice approval • Search and report on information about matters, budgets, invoices, fees and other associated financials • Manage, store and track legal information related to outside counsel, plaintiffs and defendants
Company: LegalEdge Software **Product:** The Corporate Suite www.legaledge.com	**The Corporate Suite** (Available in both Client Server and Browser platforms) The Corporate Suite is a Case Management system for corporate legal departments of any size. It includes case and contact management, document management and letter merging, docket/calendaring, messaging, time tracking and a report/query library. Functionality includes: **Time Tracking** - For keeping track of tasks automatically. **Advanced Calendaring** - Provides the ability to do group and team calendaring and six additional ways to view events, including unperformed events for a matter, unperformed urgent events, and weekly and monthly box calendars (The browser product uses either Outlook, GroupWise or Lotus as its calendar).

	Roadmapping - A sophisticated rules based tickler system. Allows you to set up court rules or internal rules based upon many different things like matter type, venue or work attorney. **Customization** - Toolkits provide comprehensive metadata based customization tools which you can use to customize the software however you choose with a minimum of effort and expense. **Comprehensive Report Set -** A wide variety of matter, people, event, time and financial reports come standard with the system. **Expansive Financial Capability** **Advanced Budgeting** - Provides the ability to budget matters by expense type or time action codes. Essential for task based billing. Comes pre-loaded with UTBMS codes. **Accounting Functions** - Payable tracking, invoice approval, and check request processing. **Monitoring of Outside Counsel** • Electronic Invoicing • Rules-based control of Invoice Line Items • Decision Support System for Evaluating Performance **Business Unit Bill Back and Cost Splits -** Provides the ability to allocate costs for matters back to the responsible business unit(s).