001 - Client Communications: Good to Great

J. Daniel Fitz
General Counsel & Company Secretary
Misys plc

Jonathan Oviatt
General Counsel and Corporate Secretary
Mayo Clinic

Paulette Robinette
President
JurySync

Michael Roster
Former General Counsel
Golden West Financial Corporation

Richard T. White
Senior Vice President, Secretary & General Counsel
The Auto Club Group

Faculty Biographies

J. Daniel Fitz

J. Daniel Fitz is executive vice president, general counsel, and company secretary of Misys plc in London.

Prior to joining Misys, Mr. Fitz was group general counsel at Cable & Wireless plc, the major global communications provider. Before Cable & Wireless, Mr. Fitz worked at both Baring Brothers, the UK investment bank, and Pillsbury Winthrop, the U.S. law firm.

Mr Fitz is Treasurer of ACC and is a past president of ACC Europe.

Mr. Fitz has a B.A. and J.D. from the University of North Carolina at Chapel Hill. He also has a diploma in international and comparative politics from the London School of Economics.

Jonathan J. Oviatt

Jonathan J. Oviatt is general counsel and corporate secretary of Mayo Clinic in Rochester, Minnesota. Mayo Clinic is an academic medical center with national and international programs in clinical practice, medical education, and medical research. Mayo Clinic has over $6 billion in annual revenue and 50,000 employees. Mr. Oviatt's responsibilities include the legal department, compliance office, and other administrative functions.

Prior to joining Mayo Clinic, Mr. Oviatt was a shareholder in the Minneapolis office of Moss & Barnett, P.A. He also served on the Congressional staff and campaign staff of U.S. Senator Larry Pressler.

Mr. Oviatt is chair of the council of attorneys of the American Medical Group Association; vice chair of the in-house practice group of the American Health Lawyers Association; director and secretary of Integrative Therapies Foundation; past director and officer of the Minnesota State Bar Association section on health law; past director of Legal Advice Clinics, Ltd.; past president of Olmsted County Legal Assistance; and former chancellor of the United Methodist Church—Minnesota conference.

Mr. Oviatt received his B.A., summa cum laude, from Augustana College and his J.D., cum laude, from the University of Minnesota where he was a member of the *Law Review*.

Paulette Robinette

Paulette Robinette is founder and president of JurySync headquartered in the greater Kansas City area. JurySync is one of the nation's most respected litigation consulting firms chartered with helping trial lawyers connect with jurors. The firm specializes in fully-integrated research programs for complex civil litigation, including community attitude surveys, focus groups, mock trials, witness preparation, jury selection, and post-trial interviews.

Dr. Robinette is best known for her uniquely strategic, yet practical application of contemporary social science methodology for some of the nation's finest litigators and highest profile civil cases. Her communications consulting experience is concentrated in pharmaceutical product liability, financial/securities fraud, medical malpractice, patent infringement, and antitrust litigation.

Dr. Robinette is a sought after speaker and educator on all aspects of jury research and corporate communication. She currently serves on the board of directors of Mission Adelante, a non-profit organization chartered with serving the Hispanic community in Kansas City.

Dr. Robinette earned a doctorate and a master's degree from the University of Kansas.

Michael Roster

Michael Roster has had a distinguished career in banking, higher education and health care law. He is located in San Francisco. Until recently, he was executive vice president and general counsel of Golden West Financial Corporation/World Savings, a $130 billion financial services company that in October 2006 merged with Wachovia Corporation.

Mr. Roster previously was managing partner of Morrison & Foerster's Los Angeles office, co-chair of the firm's financial services practice group worldwide, and resident in both Los Angeles and Washington, DC. Before that, he was general counsel of Stanford University, Stanford Medical Center, and Stanford Management Company.

Mr. Roster is a former chair of ACC, outside director and vice chair of Silicon Valley Bank, and outside director and chair of the Stanford Alumni Association, Insert Therapeutics (a Caltech life sciences startup), and Encirq (a technology startup). He also is a former director of the California Bankers Association and the Federal Home Loan Bank of San Francisco.

Mr. Roster received his A.B. degree from Stanford and his J.D. from Stanford Law School.

Richard T. White

Richard T. White is senior vice president, secretary & general counsel of The Auto Club Group (ACG) at its headquarters in Dearborn, Michigan. ACG is the largest AAA club in the Midwest serving the motoring, travel, insurance, and financial services needs of over 4.2 million members in the Midwest (Illinois, Indiana, Minnesota, Iowa, Michigan, Nebraska, North Dakota, and Wisconsin). Mr. White is responsible for legal, governance, and government relations.

Prior to joining ACG, Mr. White was in private practice as a founding and managing partner in the firm of Lewis, White & Clay (currently Lewis & Munday) where he specialized in corporate, mergers/acquisitions, health care, and insurance law.

Mr. White is the current ACC Chair and serves on the Board Of Directors And Executive Committee. He is also on the board of directors, executive committee, and chairs the audit committee of The Bartech Group. Mr. White served as a commissioner of the foreign claims settlement commission pursuant to a presidential appointment and reappointment. He also served as a commissioner and vice-chair of the Michigan Transportation Commission.

Mr. White received a B.A. from Morehouse College, with honors, and is a graduate of the Harvard Law School.

Client Communications – Good to Great
By Michael Roster
October 29, 2007

A. Three Key Points

1. "Communication is what is received, not what is sent" -- Jack Foltz , former General Counsel of Sunoco and former ACC chair
2. The difference between one-way and two-way communication (a demonstration)
3. Do it backwards

B. Pictures are worth a Thousand Words

1. Good use of PowerPoint, versus bad: http://vids.myspace.com/index.cfm?fuseaction=vids.individual&videoID=1529637984
2. Use of pictograms can often communicate much more effectively than pages of words

C. Agreements and Other Documents

1. Charts as part of the formal agreement can sometimes convey more meaning than words
2. Use of a business letter versus legalistic agreements
3. Simplifying boilerplate
4. Use of appendices

D. Email

1. Pick up the phone, or better yet, go see the person
2. Don’t try to make or resolve arguments in email
3. Don’t shout
4. Less is best

E. Communicating with Internal Clients and the Board

1. Delivering bad news
2. How much information is “just right”
3. Board presentations – some do’s and don’ts
4. “Keeps me up to date with the law” – managing expectations
5. Monthly or quarterly, informal meetings (pick up on developments; give quick nuggets)
6. For managing budgets, use of quarterly bank statements to internal clients
7. For client responsiveness and satisfaction, use of annual client surveys and appropriate follow-up

F. Body Language

1. How to read the body language of people you are dealing with
2. How others read you

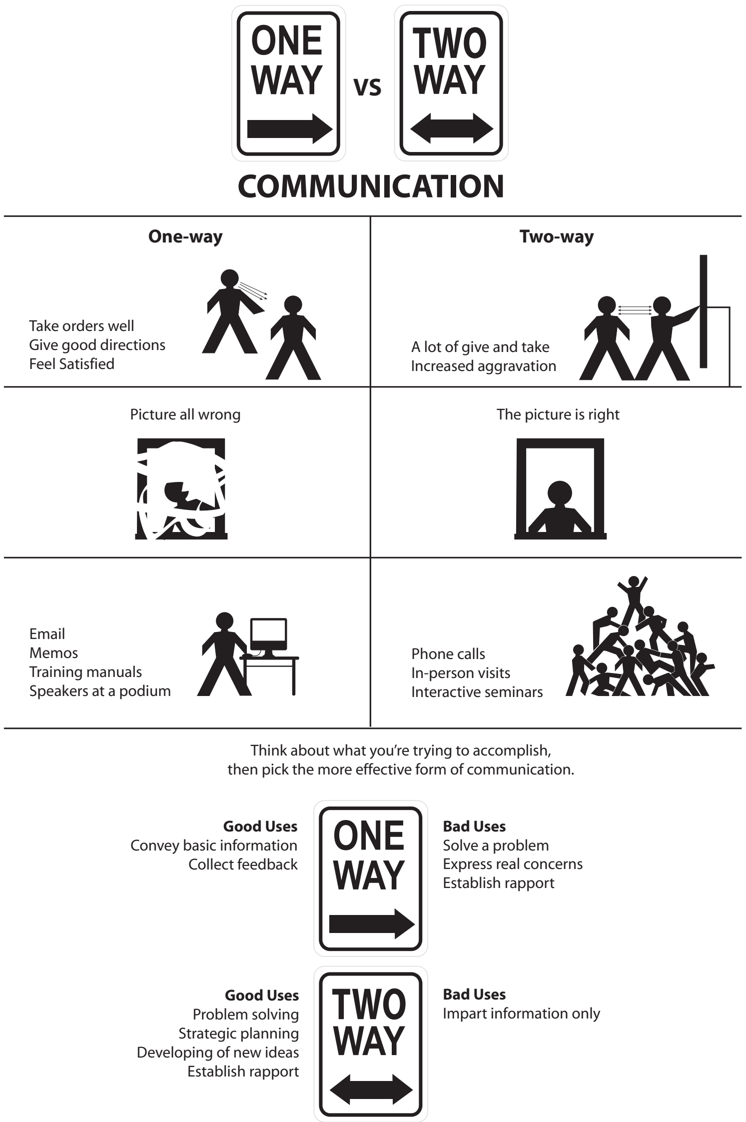
G. Other Topics

Communicating with the Public in a Crisis
- Some do's and don’ts in a crisis
- Having a crisis plan (and knowing it will be different)

Corporate Training and Compliance
- Example of managing expectations
- Web interactive instruction and resources, versus memos and/or in-person sessions
- Again, how much information is “just right”

Better Ways to Communicate with Outside Law Firms (and other vendors)
- Say it in dollars
- Request bills that actually describe what was done, and what is planned for the next month (but be careful about risk)
- Engage in task budgeting ahead of time, and request that bills be broken down by task
- Request real time access to fees and costs by billing partner and client
- Tell the firm how you want to be kept informed and involved
- Expect more
- Eliminate the KGB syndrome (that is, an inside lawyer must always accompany an outside lawyer to all meetings, etc.)
- Consider having outside attorneys routinely attend internal law department meetings
- Likewise, consider having outside attorneys routinely attend annual law department and business unit retreats

Interviews
- Good and bad forms of investigatory interviews and reports
- Good and bad forms of job interviews



Client Communications: Good to Great

Nonverbal Communication

Paulette Robinette, Ph.D.
President, JurySync

Nonverbal Communication

non·ver·bal com·mu·ni·ca·tion The process of sending and receiving wordless messages by means of facial expressions, gaze, gestures, postures and tones of voice.

Rules for Interpreting Nonverbal Cues

1. **Look for variance from baseline**

   The more experience you have with the person, the better equipped you are for interpreting which nonverbal cues are meaningful.

2. **Read nonverbal cues in clusters**

   Isolated cues can be misleading, so examine nonverbals holistically to increase the accuracy of interpretation.

3. **Look for incongruence**

   If the verbal message is inconsistent with nonverbal cues, the nonverbal cues are a more reliable indicator of the person's true feelings.

4. **Consider situational context**

   Nonverbal cues have different meanings depending on the situation; consider the context (*e.g.*, gender, culture, temperature in room, distractions, external pressures) that may explain the cues.

5. **Self-monitor**

   Negative responses may be the direct result of nonverbal cues sent by the messenger that signal defensiveness, hostility, insecurity or deception. Practice exhibiting positive nonverbal cues to encourage positive responses and truthful feedback.

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Nonverbal Cues of Agreement

Body alignment	Aligning one's upper body with the messenger signals agreement, liking and loyalty.
Chin stroke	Conveys contemplation, thoughtfulness. Subsequent nonverbal cues indicate whether the decision reached is positive or negative.
Forward lean	May be used to convey friendliness and receptivity.
Head nods	The head-nod is an affirmative cue, widely used to show understanding, approval and agreement. Slow nods communicate interest, while rapid nods signal that the listener has heard enough and wants a turn to speak.
Head tilt side	May be used to show friendliness and foster rapport. May also signal submission or shyness.
Mirroring	More often used by women, mirroring occurs when the listener reflects and then feeds back the speaker's emotions through facial expressions.
Steeple	Gesture in which pads of fingertips touch counterparts of other hand; shows one is listening thoughtfully to another's ideas/comments; reflects careful reasoning, calculation. May also convey dominance or superiority.
Zygomatic smile	"True smile" when corners of mouth curve upward and outer corners of the eyes crinkle; very hard to produce on demand.

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Nonverbal Cues of Disagreement

Arm cross	The “classic defensive stance.” When elbows are elevated and projected outward, the arm-cross suggests arrogance, disliking or disagreement.
Body shift	Sudden body shifts may telegraph an unspoken feeling, mood or opinion. Gross changes in body position may reveal negativity toward the messenger.
CLEM	“Conjugate lateral eye movement”; involuntary eye movements to the right or left may reveal doubt, as the individual is processing and reflecting on the information.
Cover mouth	Hand-to-mouth gestures often signal deceit. When the listener covers the mouth, it may indicate that he/she believes the *speaker* is hiding something.
Cut-off	Sudden cut-off gestures (such as turning the head fully away to one side) may indicate uncertainty or disagreement.
Flexion withdrawal	Listeners may reveal negative feelings in postures, such as pulling the hands and arms backward, away from disliked speakers.
Hand behind head	In a conversation, hand-behind-head may be read as a potential sign of uncertainty, conflict, disagreement, frustration, anger or disliking.
Hand supports face	When the index finger points vertically up the cheek and the thumb supports the chin, the listener may be having negative or critical thoughts about the speaker. Sometimes the index finger may rub or pull at the eye as the negative thoughts continue.

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Nonverbal Cues of Disagreement

Hands clenched	Shows a restrained, anxious or negative attitude. During a negotiation, reveals the person may believe he/she is losing a point.
Head down	May signal a negative, judgmental, or aggressive attitude.
Head tilt back	May reveal contempt, particularly if accompanied by other “contempt-scorn” cues, such as raising one eyebrow, narrowing the eyes, or depressing corners of the mouth.
Throat clear	In a listener, may suggest disagreement, anxiety, doubt; if aggressive may be used to interrupt or challenge. In speakers, conveys apprehension or anxiety, likely caused by unconscious feeling of being suffocated.
Lip touch	The lip-touch signals a variety of moods and mental states including anxiety, boredom, excitement, fear, and uncertainty. In conversation, the lip-touch may reveal an unexpressed feeling, opinion, or thought to be explored.
Lowered eyebrows	Slightly lowered eyebrows may telegraph unvoiced disagreement.
Self-touch	Physical contact with one’s clothing or body parts; accomplishes self-reassurance when anxious or stressed; rubbing and pinching may signal deception, disagreement; hair twisting may indicate disinterest, anxiety.
Tense mouth	Sudden lip-compression may signal the onset of anger, disliking, grief, sadness or uncertainty. Barely noticeable lip-clenching may signal unvoiced opposition or disagreement.

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Strategies for Responding to Negative Nonverbal Cues

1. **Prompt listener to change position**

   A negative attitude often produces nonverbal cues of disagreement, such as crossing the arms or legs. Maintaining the negative posture reinforces the attitude and diminishes the listener's ability to retain the message. Prompting a change in position, by offering the listener a cup of coffee or a handout to hold, may increase his/her willingness to listen.

2. **Change tactics by moving to another message point**

   Continuing to pursue a point that elicits negative nonverbal cues from the listener may escalate the problem. Take advantage of the opportunity to increase listener's receptivity by changing tactics before he/she verbalizes a "no."

3. **Maintain steady and mid-range tone of voice**

   When two people converse, the person whose low-frequency (*i.e.*, dominant) vocal characteristics change the least is perceived by both as having the higher social status. Low pitch is the equivalent of a growl; low and loud is like a bark; high-pitched is a whine. High pitched tone conveys lack of control, and raising the tone at the end of each sentence conveys uncertainty.

4. **Use congenial body posture and ask for listener's thoughts**

   Palm-up (fingers extended and hand rotated upward) cross culturally reflects congeniality, drawing others closer and helping to build rapport. Held out to an opponent across a conference table, the palm-up cue may, like an olive branch, enlist support as a gestured emblem of peace. Combining this signal with an open upper body posture such as a head-tilt or shoulder-shrug communicates harmlessness and friendly intent, inviting approach and affiliation.

Paulette Robinette, Ph.D.
President, JurySync LLC

probinette@jurysync.com
www.jurysync.com
(913) 338-4301

Definitions and descriptions in these materials have been adapted from the following sources:

Givens, D. B. (2006). *The nonverbal dictionary of gestures, signs & body language cues*. Spokane, WA: Center for Nonverbal Studies Press. Retrieved September 10, 2007 from http://members.aol.com/nonverbal2/diction1.htm.

Pease, A. & Pease, B. (2004). *The definitive book of body language.* New York: Bantam.

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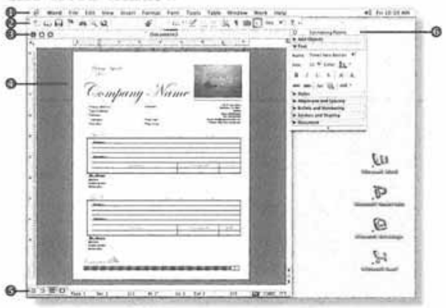
Microsoft® Word 2004 for Mac

Getting Started

The Word Window



1. **Menu Bar** – contains all tools for use with Word 2004.
2. **Standard Toolbar** – contains shortcuts for standard Word actions and tools.
3. **Title Bar** – contains the name of the active document and the **Close**, **Minimize**, and **Zoom** buttons.
4. **Document Pane** – displays the active document.
5. **View Buttons** – contains shortcuts to change your document view.
6. **Formatting Palette** – contains shortcuts for document formatting features.

Using the Formatting Palette

The Formatting Palette is a floating window that contains shortcuts for adding and formatting objects. It is displayed by default when you launch Word 2004. If the Formatting Palette is not displayed, select **Formatting Palette** from the **View** menu or click the **Formatting Palette** button on the **Standard** toolbar.

- *To display a panel in the Formatting Palette,* click the panel heading. *(The **Font** panel is displayed by default.)*
- *To customize the Formatting Palette,* click the **Customize** button at the bottom of the **Formatting Palette** and select **Customize Formatting Palette** from the resulting menu. Make changes and click the **OK** button.
- *To close the Formatting Palette,* click the **Close** button in the upper-left corner of the **Formatting Palette** or click the **Formatting Palette** button on the **Standard** toolbar.

Using the Project Gallery

The Project Gallery is the entry point of all Office 2004 programs. By default, the Project Gallery appears when you launch Word 2004. The following tabs are contained in the Project Gallery:

- **New** – displays Office templates.
- **Recent** – shows a list of the most recent documents you have created or edited.
- **Project** – displays files created in the Project Center.
- **Learn** – displays help and sample files for Office 2004.
- **Customize** – allows you to change the settings for the Project Gallery.

Creating a New Blank Document

1. Select **Project Gallery** from the **File** menu.
2. Click on the **New** tab.
3. Select **Web Page**, **Word Document**, or **Word Notebook** in the box on the right.
4. Click the **Open** button.

*Note: You can also select **New Blank Document** from the **File** menu or click the **New Blank Document** button on the **Standard** toolbar.*

Creating a New Document from a Template

1. Select **Project Gallery** from the **File** menu.
2. Click on the **New** tab.
3. Select a group in the **Groups** box. *(Click the arrow ▶ next to a group heading to display its subheadings.)*
4. *Optional:* To display only Word templates, click the arrow on the **Show** box and select **Word Documents** from the resulting menu.
5. Select a document template in the box on the right.
6. Click the **Open** button.

*Note: To change how the templates are displayed, click the **View Templates as List** or **View Templates as Gallery** button.*

Opening a Document

1. Select **Open** from the **File** menu or click the **Open** button on the **Standard** toolbar.
2. Locate and select the document you want to open.
3. Click the **Open** button.

*Note: To open a recently used document, select the file name from the bottom of the **File** menu.*

Saving a Document

1. Select **Save** from the **File** menu or click the **Save** button on the **Standard** toolbar.
2. Enter a file name in the **Save As** box.
3. Select the location where you want to save the document.
4. Click the **Save** button.

*Note: To quickly save after the initial save, press ⌘ + S or click the **Save** button on the **Standard** toolbar.*

Saving a Document as a Web Page

1. Select **Save as Web Page** from the **File** menu.
2. Enter a file name in the **Save As** box.
3. Select a location where you want to save the document.
4. Click the **Save** button.

*Note: To view the document in your default Web browser, click the **Web Page Preview** button on the **Standard** toolbar.*

Saving a Document Using Versions

You can save multiple drafts of a document within the same document.

1. Select **Versions** from the **File** menu.
2. Click the **Save Now** button.
3. *Optional:* Enter comments in the **Comment on version** box.
4. Click the **OK** button.

*Note: To open a version of a document, select **Versions** from the **File** menu. Select the version you want to open and click the **Open** button.*

1

Text

Formatting Text

You can change the font, font size, and apply text effects in the **Font** dialog box.

1. Select the text you want to format.
2. Select **Font** from the **Format** menu.
3. Make selections in the **Font** dialog box. *(A preview of the text will appear in the **Preview** box.)*
4. Click the **OK** button when you are finished.

*Note: To quickly format text, use the buttons in the **Font** panel of the **Formatting Palette**.*

Using the Format Painter

Use the Format Painter to copy text formatting from one selection to another.

1. Select the text that has the formatting you want to copy.
2. Click the **Format Painter** button on the **Standard** toolbar.
3. Select the text you want to copy formatting to.

*Note: To apply formatting to several selections of text, double-click the **Format Painter** button on the **Standard** toolbar. When you are finished copying formatting, click the **Format Painter** button again to disable it.*

Applying a Text Style

1. Select the text you want to apply a text style to.
2. Click the **Styles** panel heading in the **Formatting Palette** to display the panel.
3. Select the style you want to apply to the text in the **Pick a style to apply** box.

*Note: Select **Clear Formatting** in the **Pick a style to apply** box to remove all of the formatting of the selected text.*

Creating a New Text Style

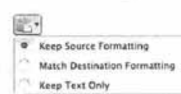
1. Click the **Styles** panel heading in the **Formatting Palette** to display the panel.
2. Click the **New Style** button in the **Styles** panel.
3. Enter a name for the style in the **Name** box.
4. Make additional selections in the **Properties** section.
5. Make formatting selections in the **Formatting** section.
6. Click the **OK** button when you are finished.

*Note: To create a new style based on existing text, select the text before you click the **New Style** button.*

Cutting, Copying, and Pasting

1. Select the text or item you want to cut or copy.
2. Do one of the following:
   - *To cut the item,* select **Cut** from the **Edit** menu or click the **Cut** button on the **Standard** toolbar.
   - *To copy the item,* select **Copy** from the **Edit** menu or click the **Copy** button on the **Standard** toolbar.
3. Place your mouse pointer in the document where you want to paste the item.
4. Select **Paste** from the **Edit** menu or click the **Paste** button on the **Standard** toolbar.

*Note: When you paste text into your document the **Paste Options** smart button will appear. Click the **Paste Options** smart button and make a selection from the resulting menu.*



Inserting the Date and Time

1. Click in the document where you want to insert the date and time.
2. Select **Date and Time** from the **Insert** menu.
3. Select a format in the **Available Formats** box.
4. *Optional:* Check the **Update automatically** box if you want Word to automatically update the date and time when you open or print the document. *(If you do not check the box, the current date and time will be inserted as static text.)*
5. Click the **OK** button.

Note: You can format the date and time the same way you would regular text.

Creating a Table

1. Click in the document where you want to insert the table.
2. Select **Insert** from the **Table** menu.
3. Select **Table** from the resulting menu.
4. Enter the number of columns and rows you want in the table.
5. *Optional:* Make additional selections in the **Insert Table** dialog box.
6. Click the **OK** button.

*Note: To quickly insert a table, click the **Insert Table** button on the **Standard** toolbar and drag the mouse pointer to select the number of rows and columns.*

Inserting a Symbol or Special Character

1. Click in the document where you want to insert the symbol or character.
2. Select **Symbol** from the **Insert** menu.
3. Do one of the following:
   - *To insert a symbol,* click on the **Symbols** tab. Click the arrow on the **Font** box and select the font you want from the resulting menu. Select the symbol you want to insert.
   - *To insert a special character,* click on the **Special Characters** tab and select the character you want to insert.
4. Click the **Insert** button.
5. Click the **Close** button to close the **Symbol** window.

*Note: To quickly add a symbol, click the **Symbols** tab in the **Add Objects** panel of the **Formatting Palette**.*

Creating a Bulleted or Numbered List

1. Click the **Bullets and Numbering** panel heading in the **Formatting Palette** to display the panel.
2. Click the **Bullets** button or **Numbering** button in the **Bullets and Numbering** panel.
3. Enter the text that you want in the list. *(When you press the **Enter** key at the end of a line, Word will automatically display the next number or bullet.)*
4. Press the **Enter** key twice to end the list.

*Note: To add bullets or numbering to existing text, select the text you want to format and click the **Bullets** or **Numbering** button in the **Bullets and Numbering** panel.*

Formatting a Bulleted or Numbered List

1. Select the list you want to format.
2. Select **Bullets and Numbering** from the **Format** menu.
3. Do one of the following:
   - *To format a bulleted list,* click on the **Bulleted** tab and select a bullet format.
   - *To format a numbered list,* click on the **Numbered** tab and select a numbering format.
4. Click the **OK** button.

2

Paragraph Formatting & Document Formatting

Paragraph Formatting

Aligning Text

1. Click in the paragraph you want to align.
2. Click the **Alignment and Spacing** panel heading in the **Formatting Palette** to display the panel.
3. Click the **Align Left**, **Align Center**, **Align Right**, or **Justify** button in the **Horizontal** section of the **Alignment and Spacing** panel.

Setting Paragraph Indents

1. Click in the paragraph you want to set alignment for.
2. Select **Paragraph** from the **Format** menu.
3. Click on the **Indents and Spacing** tab.
4. Enter an indent amount in the **Left** and **Right** boxes.
5. *Optional:* Click the arrow on the **Special** box, select an indent type, and enter an amount in the **By** box.
6. Click the **OK** button when you are finished.

Setting Line Spacing

1. Click in the paragraph you want to set line spacing for.
2. Select **Paragraph** from the **Format** menu.
3. Click on the **Indents and Spacing** tab.
4. Click the arrow on the **Line spacing** box and select a spacing from the resulting menu. *(If you select* ***At least, Exactly****, or* ***Multiply****, enter an amount in the* ***At*** *box.)*
5. *Optional:* To add space before and after the selected paragraph, enter amounts in the **Before** and **After** boxes.
6. Click the **OK** button when you are finished.

Creating Columns

1. Select the text you want to make into columns or click in the document to make the entire document into columns.
2. Select **Columns** from the **Format** menu.
3. Select a column preset in the **Presets** section.
4. *Optional:* Make additional selections in the **Column** dialog box.
5. Click the **OK** button when you are finished.

Note: To quickly create columns, click the ***Columns*** *button on the* ***Standard*** *toolbar and drag the mouse pointer to select the number of columns you want.*

Setting Tab Stops

1. Select the paragraph you want to set a tab stop for.
2. If the **Ruler** is not visible, select **Ruler** from the **View** menu.
3. Click the **Left tab** button at the far left of the horizontal ruler.
4. Select the type of tab you want to insert from the resulting menu. *(For additional tab options, select* ***Tabs****, make selections in the* ***Tabs*** *dialog box, and click the* ***OK*** *button.)*
5. Click the location on the horizontal ruler where you want to place the tab stop.

Moving or Clearing Tab Stops

1. Select the paragraph you want to change tab stops for.
2. Do one of the following:
   - *To move the tab stop,* drag the tab marker to the left or right on the horizontal ruler.
   - *To clear the tab stop,* drag the tab marker up or down off the horizontal ruler.

Document Formatting

Setting the Paper Size and Orientation

1. Select **Page Setup** from the **File** menu.
2. Click the arrow on the **Paper Size** box and select a paper size from the resulting menu.
3. Select a page orientation.
4. *Optional:* To scale the document, enter a scale amount in the **Scale** box.
5. Click the **OK** button.

Setting Page Margins

1. Select **Document** from the **Format** menu.
2. Click on the **Margins** tab.
3. Enter margin amounts in the **Top**, **Bottom**, **Left**, **Right**, and **Gutter** boxes.
4. Click the arrow on the **Apply to** box and select an option from the resulting menu.
5. Click the **OK** button when you are finished.

Note: To quickly set page margins, make changes in the ***Document*** *panel in the* ***Formatting Palette****.*

Creating Headers and Footers

1. Select **Header and Footer** from the **View** menu.
2. Enter text or graphics in the outlined header and footer areas. *(To insert AutoText, click the* ***AutoText*** *button on the* ***Header and Footer*** *toolbar and select the AutoText you want to insert.)*
3. *Optional:* To switch between header and footer areas, click the **Switch Between Header and Footer** button on the **Header and Footer** toolbar.
4. Click the **Close** button on the **Header and Footer** toolbar when you are finished.

Inserting Page Numbers

1. Select **Page Numbers** from the **Insert** menu.
2. Click the arrow on the **Position** box and select a position from the resulting menu.
3. Click the arrow on the **Alignment** box and select a position from the resulting menu.
4. *Optional:* To format numbers, click the **Format** button, make selections in the **Page Number Format** dialog box, and click the **OK** button.
5. Click the **OK** button when you are finished.

Applying a Theme

A theme uses colors, fonts and graphics to apply a unified design to a document.

1. Select **Theme** from the **Format** menu.
2. Select a theme in the **Theme** box. *(A preview of the theme is displayed in the* ***Sample of theme*** *box.)*
3. *Optional:* To change the color of the theme text, select a color scheme in the **Color Scheme** box.
4. Click the **OK** button when you are finished.

Note: To apply a background only to the document, select ***Background*** *from the* ***Format*** *menu. Select a color for the background and click the* ***Close*** *button to close the* ***Background*** *dialog box.*

Editing & Graphics

Editing

Checking Spelling and Grammar

Word automatically checks spelling and grammar as you type. When it identifies a spelling error, a red underline will appear under the text. When it identifies a grammar error, a green underline will appear under the text. Do any of the following:

- *To make changes to the spelling or grammar error,* **Ctrl + click** the underlined text and select from the resulting list of corrections and options.
- *To enable or disable automatic spelling and grammar checking,* select **Preferences** from the **Word** menu. Select **Spelling and Grammar** in the left panel and check or clear the **Check spelling as you type** and **Check grammar as you type** boxes. Click the **OK** button when you are finished.
- *To check spelling and grammar all at once,* select **Spelling and Grammar** from the **Tools** menu or press **F7**.

Using Find and Replace

1. Select **Find** from the **Edit** menu.
2. Do one of the following:
   - *To find text,* enter text you want to find in the **Find what** box and click the **Find Next** button.
   - *To replace text,* click on the **Replace** tab and enter text in the **Replace with** box. Click the **Replace** or **Replace All** button.
3. Click the **Close** button when you are finished to close the **Find and Replace** window.

Note: For additional search options, click the arrow in the lower-left corner of the ***Find and Replace*** *window.*

Using AutoCorrect

The AutoCorrect feature automatically detects and corrects typos, misspelled words, and incorrect capitalization.

1. Select **AutoCorrect** from the **Tools** menu.
2. Make changes to **AutoCorrect** options.
3. *Optional:* Click the **Exceptions** button to prevent unwanted spelling corrections. Enter information and click the **OK** button.
4. *Optional:* To create an AutoCorrect entry, enter text in the **Replace** and **With** boxes.
5. Click the **OK** button when you are finished.

Note: When a correction is made the ***AutoCorrect Options*** *smart button will appear. Place your mouse pointer under the beginning of the word to display the button, click the* ***AutoCorrect Options*** *smart button, and make a selection from the resulting menu.*

Creating an AutoText Entry

An AutoComplete tip will appear when you type the first several letters of an AutoText entry. Press the **Enter** key to insert the AutoText or keep typing to ignore the entry.

1. Select the text you want to make into AutoText.
2. Select **AutoText** from the **Insert** menu.
3. Select **AutoText** from the resulting menu. *(Your text will appear in the* ***Preview*** *box.)*
4. Click the **Add** button.

Using AutoFormat

AutoFormat allows you to automatically apply formatting to text.

1. Select **AutoCorrect** from the **Tools** menu.
2. Click on the **AutoFormat As You Type** tab.
3. Check or clear the options that you want to apply.
4. Click the **OK** button.

Graphics

Inserting Clip Art

1. Click in the document where you want to insert clip art.
2. Select **Picture** from the **Insert** menu.
3. Select **Clip Art** from the resulting menu. *(The* ***Clip Gallery*** *will appear.)*
4. Select the type of clip art you want in the **Category** box.
5. Select the graphic you want in the **Clip Art** box.
6. Click the **Insert** button.

Note: To search for a specific graphic, enter a word or phrase that describes the clip in the ***Search*** *box and click the* ***Search*** *button.*

Inserting a Picture from a File

1. Click in the document where you want to insert the picture.
2. Select **Picture** from the **Insert** menu.
3. Select **From File** from the resulting menu.
4. Locate and select the graphic file you want to insert.
5. Click the **Insert** button.

Note: To edit a picture, select the picture and make selections in the ***Image*** *panel in the* ***Formatting Palette*** *or on the* ***Picture*** *toolbar.*

Inserting WordArt

1. Click in the document where you want to insert WordArt.
2. Select **Picture** from the **Insert** menu.
3. Select **WordArt** from the resulting menu.
4. Select a WordArt style in the **WordArt Gallery** dialog box.
5. Click the **OK** button.
6. Enter the text you want in the **Text** box.
7. *Optional:* Make changes to the font and font formatting.
8. Click the **OK** button when you are finished.

Formatting WordArt

1. Select the WordArt you want to format.
2. Click the **Format WordArt** button on the **WordArt** toolbar.
3. Make selections in the **Format WordArt** dialog box.
4. Click the **OK** button when you are finished.

Inserting an AutoShape

1. Select **Picture** from the **Insert** menu.
2. Select **AutoShapes** from the resulting menu.
3. Click the **Basic Shapes**, **Block Arrows**, **Flowchart**, **Stars and Banners**, or **Callouts** button on the **AutoShapes** toolbar.
4. Select the shape you want from the resulting menu.
5. Click and drag in the document to place the shape.

Note: To format an AutoShape, select the shape and select ***AutoShape*** *from the* ***Format*** *menu.*

Office Toolbox, Views & Reviewing

Office Toolbox

To display the Office Toolbox, select **Toolbox** from the **View** menu, or click the **Toolbox** button on the **Standard** toolbar. To close the Office Toolbox, click the **Close** button in the upper-left corner of the **Office Toolbox** or click the **Toolbox** button on the **Standard** toolbar.

Using the Scrapbook

The Scrapbook can collect and store items from all Office programs. For example, you can add your company logo to the Scrapbook to quickly add to your office files. The scrapbook only accepts .gif, .jpg, .pict, .png, .bmp, MacPaint, text, and Unicode text files.

1. Click the **Scrapbook** button in the **Office Toolbox**.
2. Do one of the following:
   - *To add an item from the current document,* select the item, click the arrow on the **Add** button, and select **Add Selection** from the resulting menu.
   - *To add an item from your computer,* click the arrow on the **Add** button and select **Add File** from the resulting menu. Locate and select the file you want to add and click the **Choose** button.
   - *To add an item from the clipboard,* copy or cut the item you want to add, click the arrow on the **Add** button, and select **Add from Clipboard** from the resulting menu.

Note: To add a scrapbook item to a document, select the scrapbook item and drag it to the place in your document where you want to insert it.

Using Reference Tools

The Dictionary, Thesaurus, Encyclopedia, and Web search features are included in the Reference Tools window of the Office Toolbox.

1. Click the **Reference Tools** button in the **Office Toolbox**.
2. Enter a word or phrase in the **Word or Phrase** box.
3. Click the **Go** button.
4. *Optional:* Click the **Thesaurus** heading to display the meanings and synonyms.
5. *Optional:* To use Web tools, click the **Search Encarta Encyclopedia** or **Search MSN** buttons. Click the **Close** button to close the browser window.

Using Compatibility Report

The Compatibility Report feature allows you to ensure your document will be opened and displayed correctly in other versions of Word.

1. Click the **Compatibility Report** button in the **Office Toolbox**.
2. Click the arrow on the **Check compatibility with** box and select a version of Word from the resulting menu.

Using the Project Palette

You can add the current Word file to a project that was created in Entourage 2004.

1. Click the **Projects** button in the **Office Toolbox**.
2. If the project that you want is not displayed, click the arrow next to the Project title and select the project you want to add the current file to.
3. Click the **Add current file** button.
4. Click the **OK** button.

Views

Using Document Views

To change the document view, select **Normal**, **Online Layout**, **Page Layout**, **Outline**, or **Notebook Layout** from the **View** menu. You can also click the **Normal View**, **Outline View**, **Page Layout View**, or **Notebook Layout View** buttons in the bottom-left corner of the document window.

Using the Notebook Layout View

The Notebook Layout allows you to take notes in an electronic notebook format. You can create outlines, flag notes for follow-up, create audio files, and use the handwriting feature while in this view.

1. Select **Notebook Layout** from the **View** menu or click the **Notebook Layout** button in the bottom-left corner of the document window.
2. Click the **Convert** button to confirm that you want to reformat the document to be displayed in **Notebook Layout** view. *(Note that some of the formatting in the original document may be lost.)*

*Note: To close the **Notebook Layout** view, select another view from the **View** menu.*

Using the Navigation Pane

1. Select **Navigation Pane** from the **View** menu.
2. Click the arrow on the box at the top of the pane and do one of the following:
   - *To view the document pages as thumbnails,* select **Thumbnail** from the resulting menu. *(Click a thumbnail to go to that page in the document.)*
   - *To view a list of headings in the document,* select **Document Map** from the resulting menu. *(Click a heading to go to that heading in the document.)*
3. To close the Navigation Pane, select **Navigation Pane** from the **View** menu.

Reviewing

Tracking Changes

1. Select **Toolbars** from the **View** menu and select **Reviewing** from the resulting menu to display the **Reviewing** toolbar.
2. Click the **Track Changes** button on the **Reviewing** toolbar.
3. Make changes to the document and Word will track the changes.

Inserting a Comment

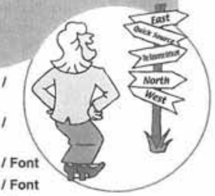
Before you insert a comment make sure that you are in **Page Layout** view.

1. Click in the document or select the text where you want to insert the comment.
2. Select **Comment** from the **Insert** menu or click the **New Comment** button on the **Reviewing** toolbar.
3. Enter text in the comment box.
4. Click in the document when you are finished.

Reviewing Changes and Comments

1. Click the **Previous** or **Next** button on the **Reviewing** toolbar to view each item in sequence.
2. Click the **Accept Change** or **Reject Change/Delete Comment** button on the **Reviewing** toolbar for each item.

Shortcuts, Output & Getting Help



Shortcuts

Standard Toolbar

New Blank Document	⌘ + N	File / New Blank Document
Open	⌘ + O	File / Open
Save	⌘ + S	File / Save
Flag for Follow Up	*none*	Tools / Flag for Follow Up
Print	⌘ + P	File / Print
Print Preview	*none*	File / Print Preview
Web Page Preview	*none*	File / Web Page Preview
Cut	⌘ + X	Edit / Cut
Copy	⌘ + C	Edit / Copy
Paste	⌘ + V	Edit / Paste
Format Painter	*none*	*none*
Undo	⌘ + Z	Edit / Undo
Redo	⌘ + Y	Edit / Redo
Tables and Borders	*none*	View / Toolbars / Tables and Borders
Insert Table	*none*	Table / Insert / Table
Columns	*none*	Format / Columns
Navigation Pane	*none*	View / Navigation Pane
Show/Hide ¶	*none*	*none*
Toolbox	*none*	View / Toolbox
Formatting Palette	*none*	View / Formatting Palette
Zoom	*none*	View / Zoom
Microsoft Word Help	*none*	Help / Word Help

Font Panel

Font	⌘ + D	Format / Font
Font Size	⌘ + D	Format / Font
Font Color	⌘ + D	Format / Font
Bold	⌘ + B	Format / Font
Italic	⌘ + I	Format / Font
Underline	⌘ + U	Format / Font
Shadow	⌘ + D	Format / Font
Superscript	⌘ + D	Format / Font
Subscript	⌘ + D	Format / Font
Strikethrough	⌘ + D	Format / Font
Double Strikethrough	⌘ + D	Format / Font
Small Caps	⌘ + D	Format / Font
All Caps	⌘ + D	Format / Font
Highlight	⌘ + D	Format / Font

Output

Previewing a Document

- *To preview how your document will look when it is printed,* select **Print Preview** from the **File** menu or click the **Print Preview** button on the **Standard** toolbar.
- *To exit the preview,* click the **Close Preview** button on the **Print Preview** toolbar.

Printing a Document

1. Select **Print** from the **File** menu or press ⌘ + P.
2. Select options in the **Print** dialog box.
3. Click the **Print** button to print the document.

*Note: To quickly print the document using the default settings, click the **Print** button on the **Standard** toolbar.*

E-mailing a Document

1. Select **Send To** from the **File** menu.
2. Select **Mail Recipient (as HTML)** or **Mail Recipient (as Attachment)** from the resulting menu.
3. Enter a name or e-mail address in the **To** box and press the **Enter** key.
4. Enter a subject in the **Subject** box.
5. Click the **Send Now** button when you are finished.

Getting Help

Using the Office Assistant

The Office Assistant provides context-sensitive tips and answers to your questions.

1. Select **Use the Office Assistant** from the **Help** menu.
2. Click once on the Assistant.
3. Enter a question or text in the **What would you like to do?** box.
4. Click the **Search** button.
5. Click on a topic to view its Help text.

*Note: To change the Office Assistant options, click once on the Assistant and click the **Options** button. To turn off the Office Assistant, select **Use the Office Assistant** from the **Help** menu.*

Using Sample Documents

Word 2004 comes with sample documents that include instructions on how to create a variety of documents.

1. Select **Sample Documents** from the **Help** menu.
2. Select the sample document you want to use.
3. Click the **Open** button.

Using Word Help

1. Select **Word Help** from the **Help** menu or click the **Microsoft Word Help** button on the **Standard** toolbar.
2. Do one of the following:
   - *To search for a Help topic,* enter the text you want to search for in the **What are you searching for?** box and click the **Search** button.
   - *To browse the Help Table of Contents,* click the **Contents** button. Click a topic heading to view its subtopics and click a subtopic heading to view its Help topics.
   - *To use the Index,* click the **Index** button. Click the letter the topic begins with and scroll through the alphabetical list. Click a subtopic to view Help topics.
   - *To view glossary entries,* click the **Glossary** button. Click the letter the glossary entry begins with and click the name to view the glossary entry.
3. Click on a Help topic to display help information.

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Microsoft Word Crib Sheet

- **Adding Charts to an Agreement**
  1. On the Insert menu, click Object.
  2. In the Object type box, click Microsoft Graph Chart, and then click OK.
  Graph displays a chart and its associated sample data in a table called a datasheet. To replace the sample data, click a cell on the datasheet, and then type the new text or numbers. If needed, you can import data from a text file, a Lotus 1-2-3 file, or a Microsoft Excel worksheet. You can also copy data from another program.

  For more information about how to work in Microsoft Graph — for example, how to add data labels, change the scale of the value axis, or troubleshoot charts — on the Help menu, click Graph Help. To save your chart and return to your document, on the Graph menu, click Quit & Return.

- **Merging Cells**
  You can combine two or more cells in the same row or column into a single cell. For example, you can merge several cells horizontally to create a table heading that spans several columns.
  1. On the Tables and Borders toolbar, click Eraser.
  2. Drag the eraser over the cell dividers you want to remove.
  Notes
  • You can quickly merge multiple cells by selecting them and clicking Merge Cells.
  • When you merge several cells in a column to create a vertically oriented table heading that spans several rows, use the Text Direction command (Format menu) to change the orientation of the heading text. You cannot change the direction of text on a Web page.

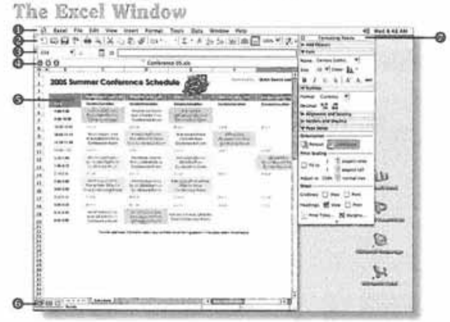
- **Wiping out Historical Records**
  1. Display the data source in the Data Form dialog box.
  2. Click Find, and then search for information that you know the record contains.
  3. Click Delete.
  You cannot undo a deleted data record. Click View Source, and then click Save on the Standard toolbar to save the changes.

QUICK Source

Microsoft® Excel 2004 for Mac

Getting Started

The Excel Window



1. **Menu Bar** – contains all tools for use with Excel 2004.
2. **Standard Toolbar** – contains shortcuts for standard Excel actions and tools.
3. **Formula Bar** – contains tools for creating and editing formulas.
4. **Title Bar** – contains the name of the active document and the **Close**, **Minimize**, and **Zoom** buttons.
5. **Worksheet Area** – displays the active worksheet.
6. **View Buttons** – contain shortcuts to change the view.
7. **Formatting Palette** – contains shortcuts for document formatting features.

*Note: To hide or display a toolbar, select **Toolbar** from the **View** menu and select a toolbar from the resulting menu.*

Using the Formatting Palette

The Formatting Palette is a floating window that contains shortcuts for adding and formatting objects. If the Formatting Palette is not displayed, select **Formatting Palette** from the **View** menu or click the **Formatting Palette** button on the **Standard** toolbar.

- *To display a panel in the Formatting Palette,* click the panel heading. *(The **Font**, **Number**, and **Page Setup** panels are displayed by default.)*
- *To customize the Formatting Palette,* click the **Customize** button at the bottom of the **Formatting Palette** and select **Customize Formatting Palette** from the resulting menu. Make changes and click the **OK** button.
- *To close the Formatting Palette,* click the **Close** button in the upper-left corner of the **Formatting Palette** or click the **Formatting Palette** button on the **Standard** toolbar.

Using the Project Gallery

By default, the Project Gallery appears when you launch Excel 2004. The following tabs are contained in the Project Gallery:

- **New** – displays Office templates.
- **Recent** – shows a list of the most recent documents you have created or edited.
- **Project** – displays files created in the Project Center.
- **Learn** – displays help and sample files for Office 2004.
- **Customize** – allows you to change the settings for the Project Gallery.

Creating a New Blank Workbook

1. Select **Project Gallery** from the **File** menu or press **Shift + ⌘ + P**.
2. Click on the **New** tab.
3. Select **Excel Workbook** in the box on the right.
4. Click the **Open** button.

*Note: You can also select **New Workbook** from the **File** menu or click the **New** button on the **Standard** toolbar.*

Creating a New Workbook from a Template

1. Select **Project Gallery** from the **File** menu.
2. Click on the **New** tab.
3. Select a group in the **Groups** box. *(Click the arrow ▶ next to a group heading to display its subheadings.)*
4. *Optional:* To display only Excel templates, click the arrow on the **Show** box and select **Excel Documents** from the resulting menu.
5. Select a document template in the box on the right.
6. Click the **Open** button.

*Note: To change how the templates are displayed, click the **View Templates as List** or **View Templates as Gallery** button.*

Opening a Workbook

1. Select **Open** from the **File** menu or click the **Open** button on the **Standard** toolbar.
2. Locate and select the workbook you want to open.
3. Click the **Open** button.

*Note: To open a recently used document, select the file name from the bottom of the **File** menu.*

Saving a Workbook

1. Select **Save** from the **File** menu or click the **Save** button on the **Standard** toolbar.
2. Enter a file name in the **Save As** box.
3. Select the location where you want to save the workbook.
4. Click the **Save** button.

*Note: To quickly save after the initial save, press ⌘ + S or click the **Save** button on the **Standard** toolbar.*

Saving a Workbook as a Web Page

1. Select **Save as Web Page** from the **File** menu.
2. Enter a file name in the **Save As** box.
3. Select a location where you want to save the document.
4. Click the **Save** button.

*Note: To view the document in your default Web browser, select **Web Page Preview** from the **File** menu.*

Saving a Workbook as a Template

1. Select **Save As** from the **File** menu.
2. Enter a file name in the **Save As** box.
3. Select the location where you want to save the template.
4. Click the arrow on the **Format** box and select **Template** from the resulting menu.
5. Click the **Save** button.

*Note: To open a template you have created, select **Project Gallery** from the **File** menu. Click on the **New** tab and select **My Templates** in the **Groups** box. Select the template you want to open and click the **Open** button.*

1

Worksheets, Rows & Columns

Worksheets

Sheet1 Sheet2 Sheet3

Inserting a Worksheet

1. Select the sheet tab Sheet1 for the worksheet you want to add the new worksheet in front of.
2. Select **Worksheet** from the **Insert** menu.

Renaming a Worksheet

1. **Ctrl + click** the sheet tab Sheet1 of the worksheet you want to rename.
2. Select **Rename** from the resulting menu.
3. Enter a new name for the sheet in the space provided.
4. Press the **Return** key when you are finished.

Note: You can also double-click the worksheet tab and enter the name in the space provided.

Deleting a Worksheet

1. **Ctrl + click** the sheet tab Sheet1 of the worksheet you want to delete.
2. Select **Delete** from the resulting menu.
3. Click the **OK** button to confirm deletion.

Hiding a Worksheet

1. Select the worksheet you want to hide.
2. Select **Sheet** from the **Format** menu.
3. Select **Hide** from the resulting menu.

*Note: To view a hidden worksheet, select **Sheet** from the **Format** menu, and select **Unhide** from the resulting menu. Select the sheet you want to view and click the **OK** button.*

Moving and Copying a Worksheet

1. **Ctrl + click** the sheet tab Sheet1 of the worksheet you want to move or copy.
2. Select **Move or Copy** from the resulting menu.
3. Do one of the following:
   - *To move the sheet to another workbook,* click the arrow on the **To book** box and select a workbook from the resulting menu.
   - *To move the sheet before another sheet in the same workbook,* select the sheet in the **Before sheet** box.
   - *To copy the sheet to another workbook,* click the arrow on the **To book** box, select a workbook from the resulting menu, and check the **Create a copy** box.
   - *To copy the sheet in the same workbook,* select a sheet in the **Before sheet** box and check the **Create a copy** box.
4. Click the **OK** button.

Note: To quickly move a worksheet in the same workbook, click and drag the sheet tab to the location you want in the row of sheet tabs.

Creating Headers and Footers

1. Select the worksheet you want to add a header or footer to.
2. Select **Header and Footer** from the **View** menu.
3. Click the arrow on the **Header** or **Footer** box and select an existing header or footer from the resulting menu.
4. *Optional:* To create a custom header or footer, click the **Customize Header** or **Customize Footer** button. Enter your text and click the **OK** button.
5. Click the **OK** button when you are finished.

Note: In a new blank workbook, you can quickly insert headers and footers. Place your mouse pointer in the top or bottom margins of the document and double-click the placeholder to add header or footer text.

Inserting a Background

1. Select the worksheet you want to apply a background to.
2. Select **Sheet** from the **Format** menu.
3. Select **Background** from the resulting menu.
4. Locate and select the file you want to use as a background.
5. Click the **Insert** button.

*Note: To delete a background, select **Sheet** from the **Format** menu and select **Delete Background** from the resulting menu. Note that worksheet backgrounds do not print.*

Rows and Columns

Inserting a Row or Column

- *To insert a row,* select a cell in the row below where you want to insert the new row and select **Rows** from the **Insert** menu.
- *To insert a column,* select a cell in the column to the right of where you want to insert the new column and select **Columns** from the **Insert** menu.

*Note: To delete a row or column, **Ctrl + click** the row or column heading you want to delete and select **Delete** from the resulting menu.*

Adjusting Row Height

- *To manually adjust a single row,* place your mouse pointer over the bottom boundary line of the row heading you want to adjust until it turns into a double arrow ✛. Click and drag to the desired height.
- *To set a precise height,* select the rows you want to adjust. Click on the **Format** menu, select **Row**, and select **Height** from the resulting menu. Enter a height in the **Row height** box and click the **OK** button.
- *To adjust the height to fit cell data,* select the rows you want to adjust. Click on the **Format** menu, select **Row**, and select **AutoFit** from the resulting menu.

Adjusting Column Width

- *To manually adjust a single column,* place your mouse pointer over the right boundary line of the row heading you want to adjust until it turns into a double arrow ✛. Click and drag to the desired width.
- *To set a precise width,* select the columns you want to adjust. Click on the **Format** menu, select **Column**, and select **Width** from the resulting menu. Enter a width in the **Column width** box and click the **OK** button.
- *To adjust the width to fit cell data,* select the columns you want to adjust. Click on the **Format** menu, select **Column**, and select **AutoFit Selection** from the resulting menu.

Hiding Rows and Columns

1. Select the row or column you want to hide.
2. Select **Row** or **Column** from the **Format** menu.
3. Select **Hide** from the resulting menu.

Displaying Hidden Rows and Columns

1. Select the row above and the row below the hidden row or select the column to the left and the column to the right of the hidden column.
2. Select **Row** or **Column** from the **Format** menu.
3. Select **Unhide** from the resulting menu.

2

Cells & Data

Cells

Inserting Cells

1. Select the cell or range of cells where you want to insert the new blank cells.
2. Select **Cells** from the **Insert** menu.
3. Select **Shift cells right**, **Shift cells down**, **Entire row**, or **Entire column**.
4. Click the **OK** button.

*Note: When you insert cells, the **Insert Options** smart button will appear. Click the **Insert Options** smart button and make a selection from the resulting menu.*

Deleting Cells

1. Select the cell or range of cells you want to delete.
2. Select **Delete** from the **Edit** menu.
3. Select **Shift cells left**, **Shift cells up**, **Entire row**, or **Entire column**.
4. Click the **OK** button.

Clearing Cells

1. Select the cell or cells that you want to clear.
2. Select **Clear** from the **Edit** menu.
3. Do one of the following:
   - *To clear everything in the cell,* select **All**.
   - *To clear formatting in the cell,* select **Formats**.
   - *To clear contents of the cell,* select **Contents**.
   - *To clear comments in the cell,* select **Comments**.

Formatting Cell Text

1. Select the cell or text that you want to format.
2. Select **Cells** from the **Format** menu.
3. Click on the **Font** tab.
4. Make changes to font formatting. *(A preview of how the text will appear is displayed in the **Preview** box.)*
5. Click the **OK** button when you are finished.

*Note: To quickly format cell text, select the cell or text you want to format and click a button on the **Formatting** toolbar.*

Using the Format Painter

1. Select the cell or text that has the formatting you want to copy.
2. Click the **Format Painter** button on the **Standard** toolbar.
3. Click on the cell you want to copy formatting to.

Aligning Cell Text

1. Select the cell or cells you want to align.
2. Click the **More Buttons** button on the **Formatting** toolbar.
3. Select **Cell Alignment**.
4. Select an alignment from the resulting menu.

*Note: To quickly align cell text, click the **Align Left**, **Align Center**, or **Align Right** buttons on the **Formatting** toolbar.*

Merging Cells

Merge cells to spread the contents of one cells over several cells.

1. Copy the data you want to spread over several cells into the upper-leftmost cell within the range.
2. Select the cells you want to merge. *(If you select cells that contain data, it will be replaced with the copied data.)*
3. Click the **Merge and Center** button on the **Formatting** toolbar.

*Note: To split merged cells, select the cells. Select **Cells** from the **Format** menu and click on the **Alignment** tab. Clear the **Merge cells** box and click the **OK** button.*

Moving and Copying Cells

1. Select the cell or cells you want to move or copy.
2. Do one of the following:
   - *To copy the cell or cells, leaving the original in its current location,* click the **Copy** button on the **Standard** toolbar.
   - *To move the cell or cells,* click the **Cut** button on the **Standard** toolbar.
3. Select the cell or cells where you want to paste the data. *(Note that if you select cells that contain data, it will be replaced with the moved or copied cells.)*
4. Click the **Paste** button on the **Standard** toolbar.

*Note: When you paste text into your document, the **Paste Options** smart button will appear. Click the **Paste Options** smart button and make a selection from the resulting menu.*

Applying Cell Borders

1. Select the cell or cells you want to apply a border to.
2. Select **Cells** from the **Format** menu.
3. Click on the **Border** tab.
4. Select **Outline** in the **Presets** section.
5. *Optional:* Make additional selections.
6. Click the **OK** button when you are finished.

*Note: To remove cell borders, select the cell you want to remove the border for. Select **Cells** from the **Format** menu and click on the **Border** tab. Select **None** in the **Presets** section and click the **OK** button.*

Data

Using Auto Fill

The Auto Fill feature will fill in a series of numbers, dates, or other sequential items.

1. Select at least two cells that contain the starting values for the order.
2. Place your mouse pointer in the bottom right corner of the selection until it turns into a plus sign +.
3. Do one of the following:
   - *To fill in increasing order,* click and drag the selection down.
   - *To fill in decreasing order,* click and drag the selection up.

*Note: When you use the Auto Fill feature, the **Auto Fill Options** smart button will appear. Click the **Auto Fill Options** smart button and make a selection from the resulting menu.*

Sorting Data

1. Select the rows, columns, or cells you want to sort.
2. Select **Sort** from the **Data** menu.
3. If the **Sort Warning** dialog box appears, make a selection and click the **Sort** button.
4. Select **Ascending** or **Descending** in the **Sort by** section.
5. *Optional:* Make additional selections.
6. Click the **OK** button when you are finished.

*Note: To quickly sort data, select the rows, columns, or cells you want to sort and click the **Sort Ascending** or **Sort Descending** button on the **Standard** toolbar.*

Applying Number Formats

1. Select the cell you want to apply number formats to.
2. Click the arrow on the **Format** box in the **Number** panel of the **Formatting Palette** and select a number format from the resulting menu.

3

Formulas & Charts

Formulas

A formula is an equation that can perform mathematical equations on data and can compare worksheet values. If the Formula Bar is not displayed, select **Formula Bar** from the **View** menu.
Note: Enter parentheses around calculations that should be performed first.

Operator (Addition) | Operator (Division) | Range Reference

=(D4+10)/AVERAGE(B1:B12)

Cell Reference | Constant | Function

Creating a Formula

1. Select the cell that will contain the formula
2. Enter an equal sign (=).
3. Enter the formula in the **Formula Input Area** of the **Formula Bar**.
4. Click the **Enter** button on the **Formula Bar** when you are finished.

*Note: To cancel the formula and return to the worksheet, click the **Cancel** button on the **Formula Bar**.*

Using the Formula Palette

Use the Formula Palette to help you create and edit formulas that contain functions. To display the Formula Palette, select a cell that contains a formula and click the **Edit Formula** button on the **Formula Bar**.

Creating a Formula Using Functions

1. Select the cell that will contain the formula.
2. Click the **Paste Function** button on the **Standard** toolbar.
3. Select a function in the **Function category** box.
4. Select a function name in the **Function name** box.
5. Click the **OK** button. *(The Formula Palette will be displayed.)*
6. Enter arguments for the function. *(To select a cell or range of cells as an argument, click the **Collapse Dialog** button, select the cells on the worksheet, and press the **Expand Dialog** button.)*
7. Click the **OK** button.

Using the AutoSum Tool

1. Click a cell below the column of numbers or to the right of the row of numbers you want to evaluate.
2. Click the arrow on the **AutoSum** button on the **Standard** toolbar.
3. Select a function from the resulting menu.
4. Do one of the following:
   - *To use the highlighted cells,* press the **Return** key.
   - *To use different cells,* select the cells you want to use, and press the **Return** key.

Checking Formula Errors

When a formula contains an error, a green triangle appears in the upper-left corner of the cell.

1. To check for errors in the entire sheet, select **Error Checking** from the **Tools** menu.
2. Make selections in the **Error Checking** dialog box.
3. Click the **Previous** or **Next** buttons to find additional errors.
4. Click the **OK** button when the error check is complete.

*Note: To quickly make changes to a formula with an error, click in the cell that contains the error. The **Error Checking** smart button will appear. Click the **Error Checking** smart button and make a selection from the resulting menu.*

Using the Auditing Toolbar

Use buttons on the **Auditing** toolbar to graphically trace the relationship between cells and formulas.

1. Select **Auditing** from the **Tools** menu.
2. Select **Show Auditing Toolbar** from the resulting menu.
3. Do one of the following:
   - *To trace cells that provide data to a formula (precedents),* select a cell and click the **Trace Precedents** button on the **Formula Auditing** toolbar.
   - *To trace formulas that reference a particular cell (dependents),* select the cell and click the **Trace Dependents** button on the **Formula Auditing** toolbar.
   - *To remove all tracer arrows,* click the **Remove All Arrows** button on the **Formula Auditing** toolbar.

Charts

Creating a Chart

1. Select the cells that contain the data to be displayed in the chart.
2. Select **Chart** from the **Insert** menu or click the **Chart Wizard** button on the **Standard** toolbar.
3. Follow the wizard to create the chart.
4. Click the **Finish** button when you are finished.

*Note: To edit or format the chart, select the chart and make selections in the **Chart Options**, **Chart Data**, and **Chart Colors, Lines, and Fills** panels in the **Formatting Palette**.*

Creating an Organization Chart

1. Select the worksheet you want to contain the organization chart.
2. Select **Picture** from the **Insert** menu.
3. Select **Organization Chart** from the resulting menu.
4. Enter information in the organization chart.
5. *Optional:* To add additional elements, make selections on the **Organization Chart** toolbar and select the element you want to attach it to.
6. When you are finished, select **Edit and Return to Object in "Filename"** from the **File** menu.
7. Click the **Update** button.

Editing an Organization Chart

1. Double-click the organization chart in the worksheet to open it.
2. Make changes to the organization chart.
3. When you are finished, select **Edit and Return to Object in "Filename"** from the **File** menu.
4. Click the **Update** button.

*Note: To delete an organization chart, select it in the worksheet and press the **Delete** key.*

Graphics, Views & Office Toolbox

Graphics

Inserting Clip Art

1. Click in the document where you want to insert clip art.
2. Select **Picture** from the **Insert** menu.
3. Select **Clip Art** from the resulting menu. *(The **Clip Gallery** will appear.)*
4. Select the type of clip art you want in the **Category** box.
5. Select the graphic you want in the **Clip Art** box.
6. Click the **Insert** button.

Inserting a Picture from a File

1. Click in the document where you want to insert the picture.
2. Select **Picture** from the **Insert** menu.
3. Select **From File** from the resulting menu.
4. Locate and select the graphic file you want to insert.
5. Click the **Insert** button.

*Note: To edit a picture, select the picture and make selections in the **Image** panel in the **Formatting Palette**.*

Views

Using Worksheet Views

To change the worksheet view, select **Normal**, **Page Layout**, or **Page Break Preview** from the **View** menu. You can also click the **Normal**, **Page Layout**, or **Page Break Preview** buttons in the bottom-left corner of the worksheet window.

Splitting Panes

Split panes to view several parts of a worksheet at once.

1. Select **Split** from the **Window** menu.
2. Click and drag the pane borders to change the pane size.
3. To remove the split, select **Remove Split** from the **Window** menu.

Note: To quickly split panes, click and drag the horizontal or vertical split bars located at the top and right corners of the scroll bar.

Freezing Panes

You can freeze horizontal and vertical panes to keep row and column labels or other data visible as you scroll through the worksheet.

1. To freeze a pane, do one of the following:
   - *To create a top horizontal pane,* select the row below where you want the split to appear.
   - *To create a left vertical pane,* select the column to the right of where you want the split to appear.
   - *To create both top and left panes,* select the cell below and to the right of where you want the split to appear.
2. Select **Freeze Panes** from the **Window** menu.

*Note: To unfreeze panes, select **Unfreeze Panes** from the **Window** menu.*

Changing View Options

1. Select **Preferences** from the **Excel** menu.
2. Select **View** in the left panel.
3. Make selections in the **Show**, **Comments**, **Objects**, and **Window options** sections.
4. When you are finished, click the **OK** button.

Viewing Multiple Workbooks

1. Open the workbooks you want to view.
2. Select **Arrange** from the **Window** menu.
3. Select **Tiled**, **Horizontal**, **Vertical**, or **Cascade**.
4. Click the **OK** button.

Viewing Multiple Worksheets

1. Open the workbook that contains the worksheets you want to view.
2. Select **New Window** from the **Window** menu.
3. In the new window, click on the sheet tab Sheet1 of the sheet you want to view.
4. Select **Arrange** from the **Window** menu.
5. Select **Tiled**, **Horizontal**, **Vertical**, or **Cascade**.
6. Click the **OK** button.

Office Toolbox

To display the Office Toolbox, select **Toolbox** from the **View** menu, or click the **Toolbox** button on the **Standard** toolbar. To close the Office Toolbox, click the **Close** button in the upper-left corner of the **Office Toolbox** or click the **Toolbox** button on the **Standard** toolbar.

Using the Scrapbook

The Scrapbook can collect and store items from all Office programs. For example, you can add your company logo to the Scrapbook to quickly add to your office files. The scrapbook only accepts .gif, .jpg, .pict, .png, .bmp, MacPaint, text, and Unicode text files.

1. Click the **Scrapbook** button in the **Office Toolbox**.
2. Do one of the following:
   - *To add an item from the current document,* select the item, click the arrow on the **Add** button, and select **Add Selection** from the resulting menu.
   - *To add an item from your computer,* click the arrow on the **Add** button and select **Add File** from the resulting menu. Locate and select the file you want to add and click the **Choose** button.
   - *To add an item from the clipboard,* copy or cut the item you want to add, click the arrow on the **Add** button, and select **Add from Clipboard** from the resulting menu.

Note: To add a scrapbook item to a document, select the scrapbook item and drag it to the place in your document where you want to insert it.

Using Compatibility Report

The Compatibility Report feature allows you to ensure your document will be opened and displayed correctly in other versions of Excel.

1. Click the **Compatibility Report** button in the **Office Toolbox**.
2. Click the arrow on the **Check compatibility with** box and select a version of Excel from the resulting menu.

Using the Project Palette

You can add the current Excel file to a project that was created in Entourage 2004.

1. Click the **Projects** button in the **Office Toolbox**.
2. If the project that you want is not displayed, click the arrow next to the Project title at the top of the toolbox and select the project you want to add the current file to.
3. Click the **Add current file** button.
4. Click the **OK** button.

Shortcuts, Output & Getting Help

Shortcuts

Standard Toolbar

New	⌘ + N	File / New Workbook
Open	⌘ + O	File / Open
Save	⌘ + S	File / Save
Flag for Follow Up	*none*	Tools / Flag for Follow Up
Print	⌘ + P	File / Print
Print Preview	*none*	File / Print Preview
Cut	⌘ + X	Edit / Cut
Copy	⌘ + C	Edit / Copy
Paste	⌘ + V	Edit / Paste
Format Painter	*none*	*none*
Undo	⌘ + Z	Edit / Undo
Redo	⌘ + Y	Edit / Redo
AutoSum	*none*	*none*
Paste Function	*none*	*none*
Sort Ascending	*none*	*none*
Sort Descending	*none*	*none*
Chart Wizard	*none*	*none*
Toolbox	*none*	View / Toolbox
Formatting Palette	*none*	View / Formatting Palette
Zoom	*none*	View / Zoom
Microsoft Excel Help	*none*	Help / Excel Help

Formula Bar

Name Box	*none*	*none*
Cancel	Esc	*none*
Enter	Return	*none*
Calculator	*none*	Tools / Calculator
Edit Formula	*none*	*none*

Output

Previewing a Workbook

- *To preview how your document will look when it is printed,* select **Print Preview** from the **File** menu or click the **Print Preview** button on the **Standard** toolbar.
- *To scroll through the worksheets in a workbook,* click the **Prev** and **Next** buttons on the **Print Preview** toolbar.
- *To exit the preview,* click the **Close Preview** button on the **Print Preview** toolbar.

Printing a Workbook, Worksheet, or Selection

1. Select **Print** from the **File** menu or press ⌘ + **P**.
2. In the **Print What** section, select **Selection, Active Sheets,** or **Entire Workbook.**
3. *Optional:* Select other print options.
4. Click the **Print** button.

Note: To quickly print the selected worksheet using the default settings, click the ***Print*** *button on the* ***Standard*** *toolbar.*

E-mailing a Workbook

1. Open the workbook that you want to send.
2. Select **Send To** from the **File** menu.
3. Select **Mail Recipient (as Attachment)** from the resulting menu. *(Your default e-mail program will open.)*
4. Enter recipient e-mail addresses in the **To** box.
5. Press the **Enter** key.
6. Enter a subject in the **Subject** box.
7. Click the **Send Now** button when you are finished.

Printing Cell Gridlines

1. Select **Page Setup** from the **File** menu.
2. Click on the **Sheet** tab.
3. In the **Print** section, check the **Gridlines** box.
4. Click the **OK** button.

Getting Help

Using the Office Assistant

The Office Assistant provides context-sensitive tips and answers to your questions.

1. Select **Use the Office Assistant** from the **Help** menu.
2. Click once on the Assistant.
3. Enter a question or text in the **What would you like to do?** box.
4. Click the **Search** button.
5. Click on a topic to view its Help text.

Note: To change the Office Assistant options, click once on the Assistant and click the ***Options*** *button. To turn off the Office Assistant, select* ***Use the Office Assistant*** *from the* ***Help*** *menu.*

Using Sample Documents

Excel 2004 comes with sample documents that include instructions on how to create a variety of documents.

1. Select **Sample Documents** from the **Help** menu.
2. Select the sample document you want to use.
3. Click the **Open** button.

Using Excel Help

1. Select **Excel Help** from the **Help** menu or click the **Microsoft Excel Help** button on the **Standard** toolbar.
2. Do one of the following:
   - *To search for a Help topic,* enter the text you want to search for in the **What are you searching for?** box and click the **Search** button.
   - *To browse the Help Table of Contents,* click the **Contents** button. Click a topic heading to view its subtopics and click a subtopic heading to view its Help topics.
   - *To use the Index,* click the **Index** button. Click the letter the topic begins with and scroll through the alphabetical list. Click a subtopic to view Help topics.
   - *To view glossary entries,* click the **Glossary** button. Click the letter the glossary entry begins with and click the name to view the glossary entry.
3. Click on a Help topic to display help information.

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6

SIX ATTRIBUTES & FAULTS OF LAW DEPARTMENTS*

ATTRIBUTES	FAULTS
1. Responds in a timely manner	1. Untimeliness of responses
2. Understands the business, products and goals	2. Ignorance of business realities
3. Gives advice that appropriately addresses risks	3. Risk aversion
4. Is accessible and available	4. Unavailability
5. Contributes as a team member	5. Poor play in the team sandbox
6. Offers practical solutions expressed clearly	6. Impracticality

*Rees W. Morrison, Esq., Client Satisfaction for Law Departments. Chicago: Corporate Legal Times, 2003.

latimes.com Los Angeles Times

http://www.latimes.com/news/local/la-fi-pr18aug18,1,858783.story?ctrack=1&cset=true
From the Los Angeles Times

PUBLIC RELATIONS

Tactics differ for 2 firms in crises

Mattel's openness this week contrasts with Countrywide's stance.
By Abigail Goldman and E. Scott Reckard

August 18, 2007

As Tuesday dawned in Southern California, two huge local companies were about to unleash separate public relations firestorms.

Mattel Inc., the country's biggest toy maker, was bracing for its second product recall in two weeks, this time of about 19 million playthings because of lead paint or magnets that could be swallowed and cause serious internal injuries.

Countrywide Financial Corp., the nation's top mortgage lender, was about to disclose that its foreclosures and delinquencies had risen to the highest levels in at least five years.

El Segundo-based Mattel did everything it could to get its message out, earning high marks from consumers and retailers. Though upset by the situation, they were appreciative of the company's response.

Countrywide, on the other hand, all but shuttered the doors at its Calabasas headquarters, offering scant public comment even as news turned worse and customers rushed to its bank branches to close their accounts.

A crisis can happen to any business. But how a company responds offers a glimpse into how executives craft a corporate image and the way they want their firms to move beyond a setback.

"You have two totally different leaders, two totally different companies, two totally different industries, but the responses tell you pretty much everything you need to know," said Paul Argenti, a professor of corporate communications at Dartmouth's Tuck School of Business.

"When you're in a crisis, that's when people really need you most," he said. "You have to be the most visible and the most present, and you have to improvise a little bit from a strong foundation."

Mattel and Countrywide were facing very different problems. Mattel was wrestling with its vendor factories, a problem within its control. Countrywide was facing a business downturn and a market whipsaw.

The other difference, Argenti said, is the two companies' crisis experience.

Mattel, for better or worse, has had plenty of recalls -- 28 since 2000 -- during which to polish its public relations game.

On the other hand, neither Countrywide nor many other financial firms have faced the kind of woes Countrywide did this week, which included rumors of layoffs and bankruptcy amid a global credit crunch.

What both had in common, Argenti and other crisis public relations experts said, was the need for a disaster plan.

Mattel turned to its 100-page crisis plan five days before the recall, as soon as it notified the federal agency overseeing product safety of the toy problems.

Countrywide did not return calls for this story.

At Mattel, just after the 7 a.m. recall announcement by federal officials, a public relations staff of 16 was set to call reporters at the 40 biggest media outlets. They told each to check their e-mail for a news release outlining the recalls, invited them to a teleconference call with executives and scheduled TV appearances or phone conversations with Mattel's chief executive.

In all, CEO Robert Eckert did 14 TV interviews Tuesday and about 20 calls with individual reporters.

By the week's end, Mattel had responded to more than 300 media inquiries in the U.S. alone.

"I thought it was important for us to be transparent, to provide information openly and quickly," Eckert said in an interview. "The alternative is to stick your head in the sand and hope it goes away. And it doesn't."

Mozilo has been mum.

At a Los Angeles Toys R Us on Friday, shoppers said they had heard about Mattel's recall and appreciated the information. Some said they were still a bit wary of Mattel or its Fisher-Price brand, but all said they probably would be willing eventually to give the toys another try.

"They're doing a good job in the sense that they're telling people," said Johanna Gutlay, 31, of Santa Monica, who was looking for a coloring book for her 20-month-old son. "Now I think they're going to be careful and safer."

At Countrywide on Tuesday, spokesman Rick Simon answered media calls with a few terse comments.

As news broke Wednesday that Countrywide was having trouble borrowing the money it needed to make loans, Simon said little beyond the company's brief news releases.

Was it possible to talk to founder and CEO Angelo Mozilo? "No way," Simon said.

Was there another executive who could talk about the liquidity crunch? Did anyone at the company want to say anything without being quoted that might help Countrywide get its story across? There would be no comment, Simon said.

"Management is completely focused on running the business in a changing environment," he said.

On Thursday, as Countrywide Bank customers withdrew their deposits and Countrywide Financial drew down an $11.5-billion credit line from a group of banks to keep its operations going, Simon did not return repeated telephone calls.

He said in an e-mail late that day that he would reply only to e-mails, and only those that asked for "clarifications . . . of what is in the news release." Calls to a Countrywide Bank representative went unreturned.

Friday morning, Rizelita Abeleda, a 59-year-old librarian at USC, went to the Beverly Hills Countrywide bank branch to withdraw $250,000 she had in a money market account.

"Because they don't say anything, it's like they're holding back so they can keep people's money," Abeleda said, adding that she couldn't get through on the bank's phone lines and had grown more nervous because of the lack of information.

Finally on Friday, Countrywide Bank President Tim Wennes did a series of interviews intended to reassure depositors that their money was safe.

"It's really been just the past couple of days that the bank has been more in the media -- yesterday in particular," he said. "And that's why I'm out here talking today."

Jerry Swerling, director of public relations studies at USC's Annenberg School for Communication, said he was inclined to give Countrywide a break.

"My guess is that they know they should be talking," he said. "One can only conclude that they don't know what to say. People might cut them a little slack for that, but that will pass."

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abigail.goldman@latimes.com

scott.reckard@latimes.com

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Times staff writer Annette Haddad contributed to this report.

MAYO LEGAL DEPARTMENT – ROCHESTER DIVISION
POLICY AND PROCEDURE FOR CLIENT LIAISON PROCESS

Purpose

One of the Legal Department's primary goals is to develop and implement client satisfaction assessment tools and practices. This Policy and Procedure is designed as one of the tactics to achieve this goal. This tactic should assign and instill responsibility and accountability in every single attorney for the ongoing client satisfaction of the Department's internal clients. This process should naturally lead to more communication with Department clients, including opportunities for attorneys to interact more frequently with clients outside of the pressure of projects and result in the delivery of more proactive/preventive legal services.

Procedure

Liaison Role

The Liaison is not expected to perform all of the legal services for a particular Client assigned nor is the Liaison the sole, or even necessarily, the primary contact for the Client regarding legal services provided by the Department. Work assignments will be determined on a case-by-case basis. As a practical matter, the Liaison will normally be an attorney or paralegal who provides a significant volume of services to the Client and/or will establish the relationship with the Client for purposes of client satisfaction assessment. The goal is to lead to closer working relationships between the Client and the Liaison and the Legal Department in general.

The responsibilities and accountabilities related to the Liaison roles for purposes of client satisfaction assessment and monitoring are described further in this policy.

Client-Liaison Assignment List

1. The Client-Liaison Assignment list (Attachment "A") will be updated no less often than annually. The assignments to individual attorneys will be specifically reviewed as part of the annual performance appraisals for all attorneys. The List will be posted on the internal Department website for reference purposes. Changes to assignments between annual reviews should be discussed with the Division/Department/Practice Group leadership.
2. The Client-Liaison Contact Tracking form (Attachment "B") will be maintained in the Matter Management system and should be updated periodically by Liaisons to indicate that the client meetings have occurred on a timely basis.
3. In January and July of each year, an update on the Client-Liaison process status will be reviewed at the System-wide Department meeting so that the Department can discuss the effectiveness of the process and solicit specific suggestions for process improvement within the Legal Department.

Client Satisfaction Meetings

1. Liaisons are expected to meet with the Physician and Administrative Lead for each respective Client twice per year to assess Client Satisfaction. We suggest that they meet once in Client's work area and once in the Legal Department, but the manner and place that they meet is entirely up to the Liaison -- whatever is most effective so long as it is done intentionally as part of a client satisfaction assessment effort.

MAYO LEGAL DEPARTMENT – ROCHESTER DIVISION
POLICY AND PROCEDURE FOR CLIENT LIAISON PROCESS

2. At the beginning of each year, a letter will be sent to each client contact. The letter will be signed by the Liaison, the Division Chair, and the General Counsel. The letter will outline the Liaison process and emphasize that the primary purpose of the meetings is for the Legal Department to "listen" and to receive input regarding how we are doing in meeting the expectations of the Client. In particular, we value constructive suggestions/criticism that will help us to improve. The letter should outline potential areas that may be discussed as deemed important by the Liaison and Client. A template letter format is available but may be customized to fit the Client as appropriate (Attachment "B").
3. The meetings with the Client should focus on assessing/discussing the following:
   a. Legal services required by the Client (Strategic/High Importance Services, Routine Services, and Repetitive Services);
   b. Planned events/developments in the Client's business that may create opportunities/needs for significant legal services in the coming year;
   c. Satisfaction with various legal services provided;
   d. Satisfaction with various Legal Department staff members involved in providing services;
   e. Satisfaction with Legal Department accessibility and processes for delivering legal services;
   f. Specific areas for improvement (even if the Client is fully satisfied, the Client should be reminded of the concept that timeliness and expense management are limitless goals);
   g. Review a list of services provided during the past year and related budget allocations;
   h. Identification of preventive law and educational opportunities;
   i. Opportunities for attorneys to learn more about the Client's needs, e.g. programs attorneys working on the Client's matters should attend, committees the attorneys should participate in from time to time, articles or other resources that provide insight regarding the Client's needs; and
   j. Other topics of interest to the Client.
4. Following each client meeting, the Liaison should briefly summarize the Client input in writing and e-mail the summary to the Division and Department Chairs and the Practice Group Chair most directly involved in legal services to the Client. A written report will assure this process remains formal and intentional and will provide historical information for reference by being maintained in the Matter Management system.
5. Discussion of specific improvement areas developed as a result of the Client-Liaison meetings should be initiated by the Liaison with Division/Department/Practice Group leadership and they should agree upon and memorialize internally any specific commitments made towards improving our service to the Client. It will be the primary responsibility of the Liaison to recommend specific improvement tactics to address Client concerns and to memorialize such commitments in a memo to the Client.

Effective Date: January 1, 2005

DM:87864 v4

Understanding the Lawyer Personality

James Wilber

Altman Weil, Inc.

(414) 427-5400

jswilber@altmanweil.com

Herding Cats

- Old saw: managing lawyers is like herding cats
- The more we know about lawyer personalities, including our own:
  - The better we can work together, or work with others
  - And for general counsel and other leaders, the better we can manage other lawyers

Personality of Lawyers

- Personality has a profound influence on behavior and on the ability to manage behavior
- Lawyers *are* different than other folk!
- Based on research by Altman Weil and the well-known Caliper personality profile test, we know that lawyers vary from the general public on 6 key traits (out of 18)

On which 6 traits are lawyers different than the general public? Can you guess?

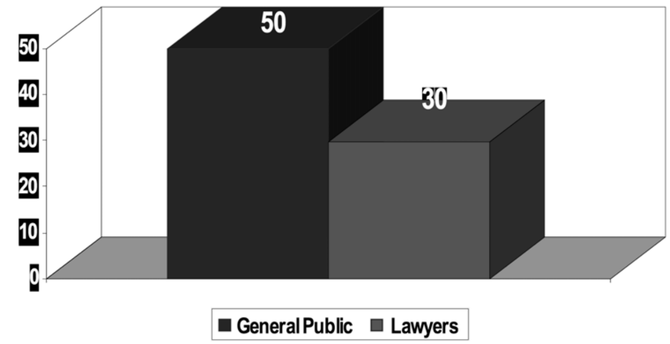
- Assertiveness
- Aggressiveness
- Ego-Drive
- Empathy
- Resilience/Ego Strength
- Risk-Taking
- Urgency
- Cautiousness
- Sociability
- Gregariousness
- Accommodation
- Skepticism
- Abstract Reasoning
- Idea Orientation
- Thoroughness / Conscientiousness
- Flexibility
- Self Structure
- External Structure / Autonomy

On which 6 traits are lawyers different than the general public?

- Assertiveness
- Aggressiveness
- Ego-Drive
- Empathy
- Resilience / Ego Strength
- Risk-Taking
- Urgency
- Cautiousness
- Sociability
- Gregariousness
- Accommodation
- Skepticism
- Abstract Reasoning
- Idea Orientation
- Thoroughness / Conscientiousness
- Flexibility
- Self Structure
- External Structure / Autonomy

Resilience (Ego Strength)

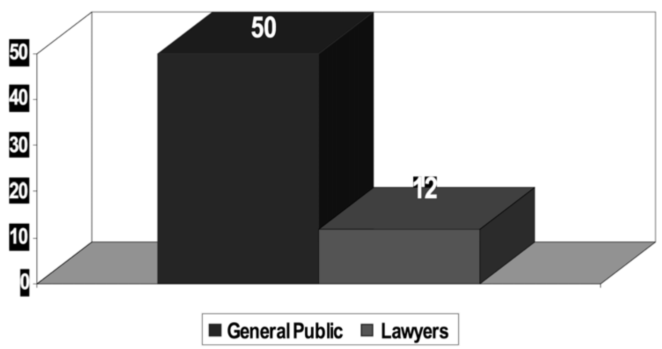
Defined: How defensive someone is; how they handle criticism



90% of lawyers score below the 50th percentile!

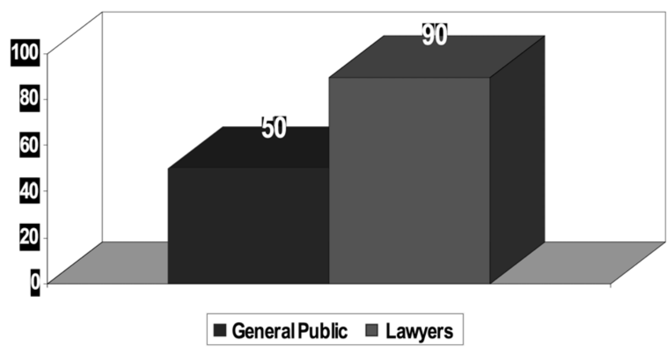
Sociability

Defined: How comfortable a person is connecting with others



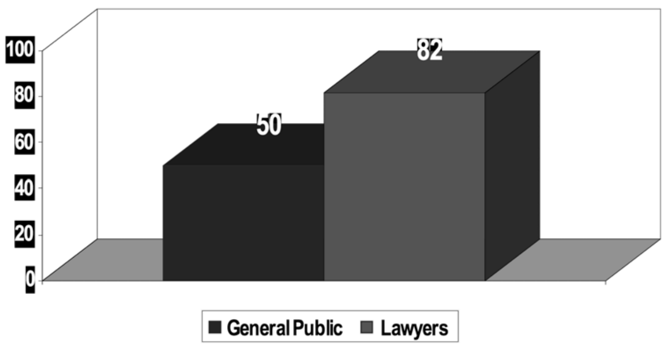
Skepticism

Defined: How guarded, protective, doubting a person prefers to be



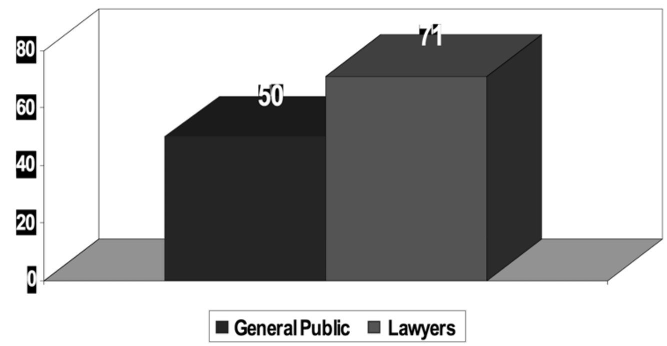
Abstract Reasoning

Defined: How analytical a person is, how well he/she uses analytical reasoning



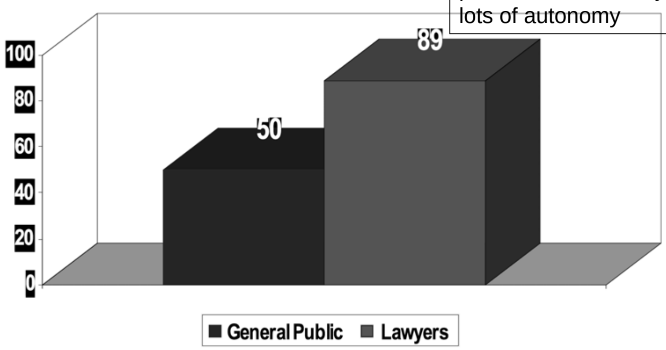
Urgency

Defined: How impatient or results-oriented a person is



Autonomy (External Structure)

Defined: Whether a person likes to follow rules, policies, procedures, or if they prefer lots of autonomy



Conclusion

- Lawyers *are* different than other folk!

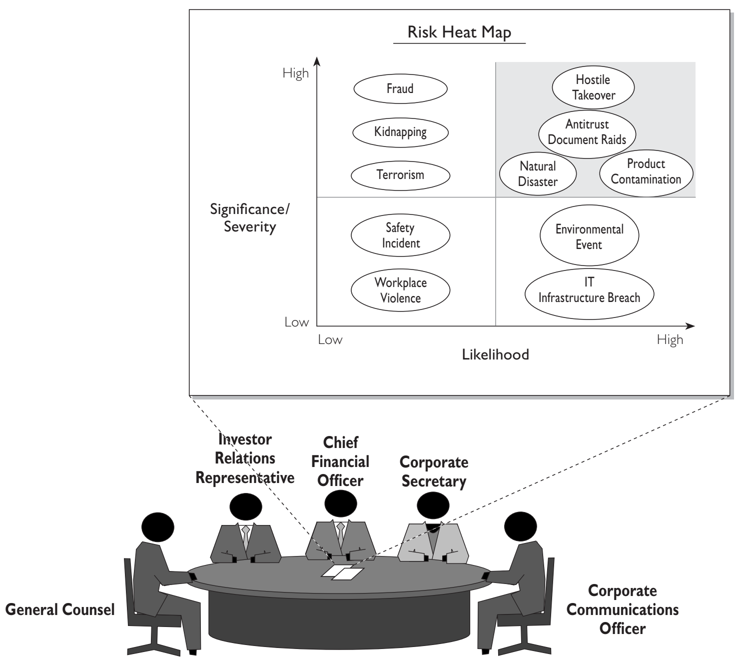
Coordinated Risk Response Planning

Legal departments should use cross-functional sessions not only to identify and assess risks, but also to plan coordinated responses to high-impact risks through exercises such as dry runs of potential crises.

Assessing the Worst-Case Scenario

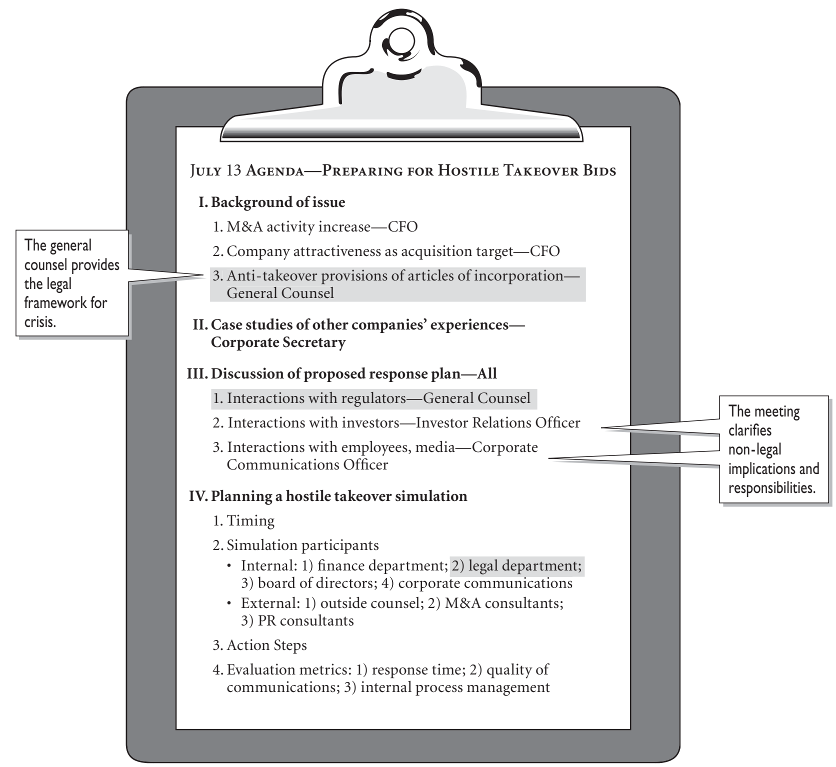
Legal departments participate in cross-functional risk assessments to identify high-impact risks…

Risk-Planning Committee Meeting



…and rehearse responses to potential crises

Risk-Planning Committee Agenda



Source: General Counsel Roundtable research.

For example, to test guidelines and templates for responding to hostile bids and to provide executives with experience in responding to a high-pressure hostile bid, Cable & Wireless stages dress rehearsals with the help of business partners and external consultants. After the simulation, participants gather to discuss and document lessons learned, and the company uses the exercise as an opportunity to update guidelines, contact lists, and legal and other relevant information.

Pressure Testing Contingency Plans

Case in Point: Cable & Wireless*

- Cable & Wireless plc (headquartered in London, United Kingdom; $6.7 billion in revenue; 17,430 employees; 40 in-house attorneys) is an international communications firm serving customers in 80 countries with wireless and fixed-line voice and data services.

Cable & Wireless Hostile Bid Simulation

Hostile Bid Launched

- Investment bankers from partnering financial institutions draft representative hostile bid attack on and defense of company management
- Hostile bid information released to .CFO

Mock Press Release Denoting 'Bid'

"Cable & Wireless management and performance over the past year have been poor….XYZ Corp. intends to take over and set things right…"

1 Alert Company Leadership

CFO informs chairman of hostile bid; corporate secretary relays information to Board of Directors

2 Assemble Response Teams

Secretary convenes senior management team and core defense team of legal, financial, administration, and communication experts

3 Alert Shareholders

Core defense team drafts notice to shareholders using pre-defined templates

4 Contact Institutional Shareholders

Companies with significant interests in C&W identified individually by core defense team (contacted in *actual* bid situation only)

5 Brief General Press

Core defense team prepares mock announcement to press indicating upcoming stock market announcement

6 Acknowledge Public Bid

Core defense team drafts mock announcement of hostile bid for official stock market press release

7 Announce Bid to Staff

Core defense team prepares mock notice of hostile bid to internal staff, arranges periodic updates

8 Schedule Principal Respondents' Meetings

Calendars, meeting rooms cleared for senior management and core defense team members

9 Involve External Advisors

Key external financial, legal, PR, business partners contacted, issued passes and permissions to meet with response teams

10 Prepare Press Briefing

Senior management dictates, and core defense team prepares, briefing pack for hostile bid press conference

11 Issue Contact List

Contact information for principal respondents—senior management, core defense team, and external advisors—updated

12 Contain Insider Information

Company identifies insiders and releases proactive communications to them to prevent leaking or misuse of insider information

13 Review Response Performance

Senior management, core defense team, and external advisors meet to assess group and individual performance

14 Capture Lessons Learned

Respondents' convocation codifies learnings in a "Book of Do's and Don'ts" and collects legal and regulatory analysis, attack, and defense documents for reference

Hostile Bid Response Refined

- Response organization, procedure, and management reviewed and adjusted based on cross-functional assessment
- Contact list and protocols updated
- Business strategy reviewed to ensure resistance to hostile bids

Legal Risks in a Hostile Bid Situation | Regulatory Requirements and Protocols

Performance Assessment Process

Group Performance
- Timetable
- Internal and External Communications
- Internal Management

Individual Performance
- Promptness of Notification, Assembly
- Quality of Analytical Response

Company Strategy

* Reprinted from *An Affirmative Defense: Innovative Approaches to Practicing Preventative Law* (2000).

Source: Cable & Wireless plc; General Counsel Roundtable research.