



# Scuttle Newsletter

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## CoALL President's Message - Winter 2011

[2](#) The beginning of a new year is one of my favorite times. Despite the cold and sometimes grayness of the world outside, I'm always filled with a sort of hope for new beginnings and fresh possibilities. I think the start of the year is a great time to really think about one's goals and aspirations and the ways in which to implement them. Change always seems possible to me in January.

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[10](#) I think the same can be true for an organization like CoALL. The new year is the perfect time for CoALL to evaluate itself as a chapter in order to see where areas of growth and improvement might be and to make sure that its members are getting what they need from their memberships. The CoALL member survey, which is being headed up by VP/President Elect, Robert Linz, is one such way in which the board is working to see that CoALL is striving to be the best organization it can. I am excited to see where the responses to this survey might take CoALL, and I encourage each of you to participate.

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As I reflect on the past year, I think it can be said that the end of 2010 was a good one. The CoALL holiday party near the end of December was once again a success, and my thanks to the librarians at CU Wise Law Library for hosting, and for everyone who worked so hard to create an evening of fun. Special thanks are due to Karen and David Selden, Georgia Briscoe, Jane Thompson, Robert Linz, Alan Pannell, Yumin Jiang, Alicia Brillon, Anne Lucke, Camilla Walker, and Tamara Phalen for helping everything run smoothly!

As we move into February, there are a few events on the horizon that are worth taking note of. The annual Spotlight on Your Career Event will be coming up at the end of February, and the Colleague Connection will be in early April. We are also in the process of requesting a chapter visit from an AALL board member, so look for information about that in the near future.

It is somewhat hard for me to believe that we are already a month into 2011, and that I am halfway through my year as President. Looking forward, I am anticipating a good year of professional growth and the development of new relationships, and I am grateful for the members of CoALL that make this possible in so many ways.

Rachel Compton  
CoALL President 2010-2011



## Congratulations!

### Officers—2010-2011

#### President

[Rachel Compton](#)  
Research Librarian  
Faegre & Benson LLP  
Phone: 303.607.3648  
Fax: 303.607.3600

#### Vice President/President Elect

[Robert Linz](#)  
Assoc. Director & Head of Public Services  
University of Colorado Law Library  
Phone: 303-492-2504

#### Secretary

[Chris Hudson](#)  
Project Coordinator, Law Librarian Fellowship Program  
University of Denver  
Phone: 303.871.6683

#### Treasurer

[Tamara Phalen](#)  
Catalog Librarian  
Brownstein Hyatt Farber Schreck, LLP  
Phone: 303.223.1413  
Fax: 303.223.8023

#### Member-at-Large

[Beth Mescall](#)  
Library & Information Resources Manager  
Davis Graham & Stubbs, LLP  
Phone: 303.892.7451  
Fax: 303.893-1379

#### Member-at-Large

[Rachel Nelson](#)  
Reference Librarian Holland & Hart  
LLP  
Phone: 303.295.8129  
Fax: 303.557.6141

#### Immediate Past President

[Tracy Leming](#)  
Reference Librarian Brownstein Hyatt  
Farber Schreck  
Phone: 303.223.1368  
Fax: 303.223.0368

The Scholarship and Grants Committee is pleased to announce that **Beth Mescall** is the 2010 recipient of the CoALL Library School Scholarship. Beth has been in the law library profession since 1993 running the Davis Graham & Stubbs law library since 2004 after having worked at both Sherman & Howard and Gorsuch Kirgis. Beth has been a member at large on the CoALL Board for a

year and a half. Prior to that she was chair of the Brown Bag committee for two years, and is still serving on the committee. She is attending the University of Denver, Morgridge College of Education, for Masters of Library and Information Science and anticipates she will graduate in about two years.

#### Starting Graduate School

**Jenny Sutherland** is happy to report that she is starting the University of Missouri's MA in Information Science with an emphasis in Library Science this Spring!

Welcome to new member **Donna Purvis** and returning member **Deborah K. McGinnis**.

Congratulations to **Susan Elder** at the U.S. Courts Library on her new position as Deputy Circuit Librarian.



CoALL President Rachel Compton awards Beth Mescall the CoALL Scholarship.



## Schedule of Brown Bags for 2010-2011

Date	Host	Moderator	Host Firm	Topic and Format
Feb. 23	Beth Mescall	Beth Mescall, Matthew El-isha, Holly Pinto, possibly one other on panel	DGS LoDo	<b>Library Staffing in Recessionary Times</b>
Mar. 16	Rachel Nelson	David Selden	H&H Downtown Denver	<b>Sustainability Issues in Libraries</b>
Apr. 19	Stacey Bowers	DU Fellows	DU Law North Denver	<b>Fellows present on ... TBA</b>
May 18	Karen Selden	Karen Selden	CU Law Boulder	<b>Book Discussion ... book TBA</b>
Jun. 22	Rachel Nelson	Stacey Bowers	H&H Downtown Denver	<b>Free and low cost legal research resources</b>

The list of favorite blogs, websites and RSS feeds from the January 2010 Brown Bag can be found on the CoAll webpage at <http://www.aallnet.org/chapter/coall/brownbag-files/Favorite-Blogs-Websites-RSS-Feeds.pdf>.

## SharePoint Sub Group Announcement

At the January 19 Brown Bag on Websites, Blogs and RSS feeds several members mentioned challenges resulting from a migration to Microsoft SharePoint by their organizations. Any members currently using SharePoint that are interested in meeting and sharing experiences please contact Susan Elder at the Tenth Circuit Library (303) 335-2654. A similar invitation has been issued to the Rocky Mountain SLA chapter. Also welcome would be members in organization that may be migrating to SharePoint in the near future.



## 2010 CoALL Holiday Party

*By Karen Seldon*

Approximately 30 CoALL members and guests attended the 2010 Holiday Party on Friday December 17 at the University of Colorado Law School's Boettcher Hall. The event was a chance to celebrate an especially "green" holiday, as the Wolf Law Building is a Gold rated LEEDs (Leadership in Energy and Environmental Design)-certified building (<http://www.colorado.edu/law/about/wolf/leed.htm>), and the event emphasized reusing, recycling, and composting all serving items and decorations. Attendees came from all points along the Front Range, including Wyoming, and academic, law firm, and special libraries were all well represented. A variety of hot and cold hors d'oeuvres were served, along with festive and seasonal drinks and desserts. Attendees had a great time socializing and networking right up until the last minute, when the building was scheduled to close.

Alan Pannell lead a tour of the University of Colorado's William A. Wise Law Library, and a short program recognized CoALL's 2010 Library School Scholarship winner and the new members who joined CoALL during 2010. CoALL President Rachel Compton welcomed the attendees and presented Beth Mescall with CoALL's annual \$1,000 Library School Scholarship. Beth will use the scholarship toward completion of her MLIS at the University of Denver.

Jane Thompson introduced and welcomed the three new CoALL members who were able to attend the Holiday Party: Mike Boucher is based in Lafayette and founded Dakota Legal Software in 2005. He grew up mainly in Minnesota, and moved to South Dakota to serve on the faculty at South Dakota School of Mines while simultaneously completing a Master of Computer Science degree. While there, he and his wife started a company that they eventually sold to Sun Microsystems. He relocated to Colorado to work for Sun, and eventually decided to enter the University of Colorado Law School's class of 2007. While law did not turn out to be his calling, he stayed long enough to take Advanced Legal Research, which he felt was an important topic to know to run his new company.



Photos from top to bottom:

(t) Karen Seldon and Gary Alexander share a laugh at the CoAll Holiday Party.

(m) Alan Pannell leads a tour of the CU Law Library for CoALL holiday party guests.

*(Continued on page 5)*



Trish Buckley is actually a returning member of CoALL. She spent 13 years as a Reference Librarian at Sherman & Howard LLC in Denver before relocating to the East Coast in 1998. She moved back to Colorado (which is “home” to her) in 2010, and is currently a Researcher for Access/Information in Denver. For more details about Trish, she was the focus of a New Member Spotlight on page 22 of the Spring 2010 Scuttle <http://www.aallnet.org/chapter/coall/scuttle/spring2010.pdf>.

Nikki Van Thiel is the Teen Librarian at Columbine Library in Littleton. She grew up in Wisconsin and attended the University of Wisconsin-Madison, where she majored in English and Art History. She moved to Denver about 10 years ago and has been working for the Jefferson County Public Library system in various positions almost ever since. She earned her MLS from Emporia State University in 2006.

Each new CoALL member who attended the Holiday Party received a leather portfolio (courtesy of Thomson/West) and a Cross pen (courtesy of Lexis/Nexis).

The final portion of the program was the door prize raffle. The University of Colorado’s William A. Wise Law Library donated 6 poinsettia plants, which were used as decorations for the party and then raffled off to attendees.

Thanks to all who attended the 2010 Holiday Party and made it such a festive event. Special thanks goes to the University of Colorado’s William A. Wise Law Library and Interim Director Georgia Briscoe for hosting the event, and to the CoALL Holiday Party committee members, who all contributed greatly to a wonderful and successful event:

Alicia Brillon, Georgia Briscoe, Yumin Jiang, Robert Linz, Anne Lucke, Alan Pannell, David and Karen Selden (Committee Co-chairs), Jane Thompson, and Camilla Walker.



Photos from top to bottom:

(t) CoALL president Rachel Compton and Kristin Karr socialize.

(m) Chris Hudson and Kathryn Michaels of DU.

(b) Nikki Van Thiel (left), new CoAll member, introduces herself to CoALL members at the holiday party.



## AALL Members Receive Discounted Registration for 2011 LMA Annual Conference

The [Legal Marketing Association \(LMA\)](#) Annual Conference is the largest educational and networking event for legal marketing and business development professionals. More than 800 attendees gather at this event annually to meet with and learn from the industry's leaders. This is a great opportunity for you to network with and hear from legal marketers of all specialties and experience levels, from firms large and small.

AALL is delighted to be an LMA Annual Conference event partner. The 2011 conference will take place **April 4-6 in Orlando, Florida, at Disney's Yacht & Beach Club Resorts**. All sessions are designed to provide you with the strategic and practical information you need to ensure that you—and your firm—retain and enhance your competitive advantage.

**Mention that you are an AALL member when registering to receive the LMA full member rate.** Book online today at [www.LMAConference.com](http://www.LMAConference.com) or call 877-562-7172 to secure your place at the legal marketing event of the year



Get ready for your close up. AALL's [A Day in the Life of the Law Library Community Photo Contest](#) starts on February 1.

During the month of February, AALL members are invited to take a wide range of photographs of law librarians working, meeting, teaching, and doing all that law librarians do in a given day. Entries are due by the end of the month, and they will be judged online through AALL membership voting in April. Winners will be recognized on AALLNET, in the July 2011 issue of *AALL Spectrum*, and during the 2011 AALL Annual Meeting in Philadelphia.

Visit the [Day in the Life site](#) for complete contest rules, photography tips, and to view the winning photos from 2005, 2007, 2008, and 2009.

## AALL2go Pick of the Month

AALL's Continuing Professional Education Committee presents the AALL2go pick of the month: [In PKI We Trust: Authenticating Our Future](#).

For online legal material information to be deemed trustworthy, the researcher must feel confident that it is authentic and accurate. But how do you know? This 60-minute MP3 recording features two experts—one on the portable document format (PDF) technology and a second from the federal government. The first speaker is Dr. James King, senior principal scientist and PDF Platform Architect at Adobe Systems Inc., who discusses the mechanics of public key infrastructure (PKI). Specifically, King explains how a PDF document can be encrypted to ensure authenticity and accuracy and further to allow for limited viewing only by intended audiences. The second speaker, Michael Wash, is chief information officer of the U.S. Government Printing Office. Wash discusses the Federal Depository System (FDSys) platform, which was completed in 2010 and will replace GPO Access in mid-2011.

**Find this and more than 80 other free continuing education programs and webinars for AALL members on [AALL2go!](#)**



## Save the Date: March 1 AALL Webinar on Servant Leadership

Filippa Marullo Anzalone, professor of law and associate dean for library and technology services at Boston College Law School, will present the March AALL webinar on servant leadership on March 1 at 11 a.m. Central Standard Time. Check the [AALL Calendar of Events](#) for more details to come.

## Manage with Confidence

From transforming libraries and nurturing staff for new roles and responsibilities to developing a strategic plan for the library to building partnerships, new law library managers have a lot on their plates. The **2011 AALL Management Institute, to be held April 7-9, in Chicago**, will provide new and aspiring managers with the opportunity to collaborate with your colleagues from all types of law libraries and develop the skills you need to manage with confidence today.

Learn how to:

- Build and nurture a professional network
- Develop effective communication
- Negotiate and handle difficult situations
- Develop a strategic plan
- Take on project management
- Champion the library's role within the institution and build partnerships



**The registration deadline is March 7**, and the number of attendees will be capped at 50. Don't wait – [register today!](#)

## Learn How to Support Your Law Firm with Strategic Knowledge Management

The current economic downturn is challenging law firms in unprecedented ways, and knowledge management (KM) is being implemented at firms to provide a competitive advantage. Join KM experts Julie Bozzell and Toby Brown for the **February 17 webinar, [Moving Beyond the Library Walls to Support Strategic Knowledge Management](#), from 11 a.m.-12 p.m. Central Time**, and hear how KM is being applied to support the practice and business of law. Learn about the role law librarians can play to support strategic KM and contribute to a leaner and more strategic model of law firm practice.

Webinar objectives:

- define knowledge management;
  - describe how KM solves law firm challenges and;
  - examine ideas to leverage expertise to support strategic KM to solve challenges
- discuss specific law librarian-led KM projects.

[Register by February 10.](#)



## Westminster Law Library Colorado Law Project

By Stacy Bowers

In January 2010, the Westminster Law Library at the University of Denver Sturm College of Law was awarded a Wolters Kluwer Law & Business Grant. The goal of the project funded by this grant was to reintroduce the value of law librarians to public librarians. According to the *AALL 2005-2010 Strategic Directions*, AALL recognizes leadership as one of its goals and in particular that law librarians be recognized as leaders and experts in legal information, research, and technology.

In order to strengthen the relationship between law librarians and public librarians, the grant team first met with representatives from the Arapahoe Library District (ALD) and from Denver Public Library (DPL). Our goal was to set the groundwork for an online survey and focus groups that would be held with reference librarians from both public library systems. In late May and early June, we asked these public reference librarians to complete a survey regarding their perceptions of and interactions with law librarians and law libraries, and to indicate the types of legally oriented reference questions they typically receive. We had 39 responses and discovered that public librarians occasionally use the assistance of law librarians and that they are generally satisfied with their interactions with law librarians. The public librarians also indicated that they do visit and utilize law libraries' websites and encourage their patrons to do the same. The information gathered in the survey assisted in the creation of the focus group questions and format.

We held three focus group sessions in June and gathered a wealth of information. We learned that public librarians view legal resources as more difficult to use than other types of information and that they find legal reference questions are harder to answer. They are also cautious about how much information they are willing to provide in regard to legally oriented reference questions. While the libraries have some legal print materials, they often rely on the Internet and other online resources to assist with these types of questions. We also learned the types of legal reference questions that public librarians' field and it was an extensive list. One of the goals with these focus groups was to find ways in which law librarians might collaborate with or assist public librarians with

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legal reference questions. Based on these discussions we determined that public librarians were interested in the concept of a website they could access or refer their patrons to that contained legal information pertaining to Colorado law. As a result, the idea for the Colorado Law Project (CLP) was born and put into motion.

The CLP is an online gateway to Colorado law and legal information. It is being created with public librarians and the general public as the primary audience. The mission of the CLP is to provide access to reliable legal information and to create an effective reference tool for public librarians to use when answering legal questions. The goal is not only to provide access, but also to provide comprehensive explanations of included materials and resources in a format and language that is easily understood by both lawyers and non-lawyers alike.

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“The goal is not only to provide access, but also to provide comprehensive explanations of included materials and resources in a format and language that is easily understood by both lawyers and non-lawyers alike.”

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We have held two training sessions with the ALD and DPL reference librarians regarding the CLP site, its content, and ways in which to use it. The feedback we received was positive and we have since learned that these librarians are already using the tool. We will hold an additional training session with DPL in January 2011. We believe that the CLP site will allow us to continue to collaborate with ALD and DPL so that we further grow and strengthen the relationship between law librarians and public librarians. We also believe that the CLP helps to establish the value of law librarians and their unique skill set and knowledge. In addition to continuing our relationship with ALD and DPL, we hope to work with other public libraries during the coming year to introduce them to the CLP.

In addition to ALD and DPL, our partners on the project include the Colorado Supreme Court Library and the DU Law Librarian Fellowship Program. The site is hosted by the Sturm College of Law and long-term maintenance and upkeep will be performed by the Westminster Law Library. You can view the CLP website at [www.law.du.edu/clp](http://www.law.du.edu/clp). Please note that the site is not complete and new information is added to the CLP on a monthly basis. Content is being created and posted based on the information we received at the focus groups with our public librarian partners.

If you would like to learn more about this project, the findings, or its ongoing status, please feel free to contact Stacey Bowers. Additionally, we value your input so please share any feedback regarding the CLP site. You can send that feedback directly to Stacey Bowers at [sbowers@law.du.edu](mailto:sbowers@law.du.edu) or click on the suggestions and comments link on the site.



## Client satisfaction interviews Help law firms Keep clients close

By Janet Ellen Raasch

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

Economists may have declared that the Great Recession is officially over, but many businesses and their legal service providers would probably beg to differ.

Over or not, the Great Recession has dramatically changed the traditional relationship between legal departments and outside counsel -- in ways that are likely to continue even as the economy improves. Longstanding grievances have risen to the surface.

Businesses and general counsel understand the parameters of this new relationship, but many law firms and lawyers do not.

After years of immunity from corporate cost-cutting efforts, 85 percent of general counsel are now being asked to cut their budgets. Only 26.2 percent of them believe that outside counsel are sensitive to their budget constraints.

To control costs, general counsel are bringing more legal work in-house and, in many cases, using non-traditional providers of legal services. For example, they are turning to cost-effective legal process outsourcers for much of the work previously done by young law firm associates – and asking their law firms to work with these alternative providers for services like e-discovery, document review and even depositions.

For work that requires a law firm, general counsel are moving some matters from costly big national firms to reasonably priced mid-sized regional firms.

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“General counsel are facing unprecedented pressure to control costs,” said Kent Zimmermann. “They are demanding discounts, more-predictable alternative fee arrangements and better service from outside counsel.”

“If general counsel do not get what they want in this buyers’ market – they are more than happy to shop around,” said Zimmermann. “Despite the common misperception within law firms, only 13 percent consider their current law firms ‘indispensible.’ More general counsel than ever are switching their primary providers.”

Zimmermann discussed this volatile new marketplace at the monthly educational program of the Rocky Mountain Chapter of the Legal Marketing Association ([www.legalmarketing.org/rockymountain](http://www.legalmarketing.org/rockymountain)), held October 12 at the Ritz-Carlton Hotel in downtown Denver.

Zimmermann is a general counsel, former CEO and management consultant with Zeughauser Group ([www.consultzq.com](http://www.consultzq.com)), a leading legal industry consultancy.

“2008 and 2009 were challenging years for law firms,” said Zimmermann. “During the first half of 2010, there was reason for optimism for many firms – but demand has been unsteady at best, and performance across the industry continues to be mixed.

“In this highly competitive market, where general counsel have more choices and are less loyal than ever before, lawyers and law firms must do everything it takes to retain and expand their existing client relationships – especially by investing wisely in client-care programs,” said Zimmermann.

“One of the best ways to try to ‘bullet proof’ clients (and expand your relationships with them) is to invest in an ongoing and systematic program of client service interviews,” said Zimmermann.

“Marketing professionals understand the value of CSIs, but many partners do not,” said Zimmermann. “Longstanding ‘disconnects’ between client and lawyer expectations have been amplified by the market challenges facing the legal industry. CSIs are one of the most effective ways to discover (and remedy) these disconnects -- before it’s too late and they destroy an important relationship.”

*General counsel are from Mars; lawyers are from la-la land*

*(Continued on page 12)*



Not surprisingly in this economy, cost has dominated the conversation between legal departments and law firms. According to *Inside Counsel* magazine, 46 percent of general counsel agree that reducing costs is essential to improving law firm relationships. Only eight percent of law firms see this issue as important.

“According to the Association of Corporate Counsel, the single most important thing a law firm can do is to provide alternative fees and value-based billing options,” said Zimmermann.

“Clients like to see retainers, for example, because this arrangement offers predictable cost from month to month. Hourly rates will endure for bet-the-company work and more specialized, high-value work, but general counsel increasingly want to see alternative fee arrangements proposed for commodity work. They might not always opt for alternative fees, but they like to see them offered.

“Rate discounts can be actual or they can be illusion,” said Zimmermann. “General counsel need to be able to show their bosses that they are taking steps to control costs. Some general counsel will tell you to visibly show discounts on your bills.

“One general counsel I interviewed asked that the firm show the rates of its top partners in New York with a discounted rate calculated on the bill for other lawyers who were performing the work,” said Zimmermann. “Long story short – you want to help the general counsel look like a star to his or her superiors.”

Staffing can be another disconnect – especially when it comes to associates. “You have to understand that the average first-year associate earns as much as an in-house lawyer with ten years’ experience,” said Zimmermann. “In many cases, in-house lawyers are resentful -- and many are explicitly refusing to pay for work performed by first- or second-year associates.

Client satisfaction is a critical measure of a law firm’s success. In many cases, a client will not volunteer dissatisfaction unless asked. The conflict-averse client will not ‘fire’ a lawyer overtly, but will simply stop sending any new matters his or her way.

“Asking clients the right questions, listening actively to their answers, and turning feedback into consistent, meaningful actions are the cornerstones of client service – inspiring client satisfaction and loyalty,”

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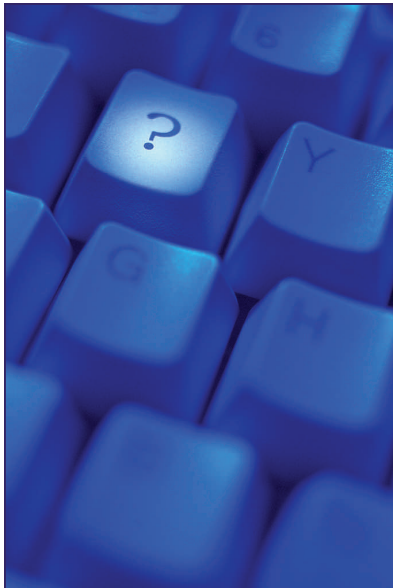
*“According to the Association of Corporate Counsel, the single most important thing a law firm can do is to provide alternative fees and value-based billing options.”*



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*“Asking clients the right questions, listening actively to their answers, and turning feedback into consistent, meaningful actions are the cornerstones of client service – inspiring client satisfaction and loyalty.”*

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said Zimmermann. “Conducting effective CSIs can help you get in front of a problem before it’s too late – and discover opportunities for new business.

“A Bay Area client for which I did CSIs, for example, did about \$1 million in legal work for an energy company in Texas that long had an external spend of \$3 million,” said Zimmermann. “The law firm was confident that it was handling about one-third of this client’s work.

“When we interviewed the client on the firm’s behalf, we found that they were indeed satisfied with the law firm – but that the client’s legal spend on the type of matter at issue had tripled over the years to \$9 million. Because the client had a misperception about the law firm’s ‘depth,’ it had been farming this work out to a number of small Texas boutiques. Armed with intelligence gained from the CSIs, firm leadership flew right down there and secured a significant amount of new work.

“Many partners simply do not understand what clients think of them,” said Zimmermann. “In an often-cited study by *Inside Counsel* magazine, outside counsel gave themselves pretty good grades on client satisfaction. Nearly 43 percent said that they deserved an ‘A’ and 50 percent said they deserved a ‘B.’

“Clients strongly disagreed,” said Zimmermann. “They gave an ‘A’ to just 17 percent and a ‘B’ to 72 percent. There is a strong disconnect between what clients want and what outside counsel are giving them. The only way to uncover this is to ask.”

*When persuading partners, show – don’t tell*

Law firm partners resist CSIs for many reasons. In particular, they erroneously think that they know everything there is to know about the client, they are in denial (they don’t want to know if a client is unhappy) or they don’t want others in the firm to know that the client is dissatisfied. “It is important to position CSIs correctly,” said Zimmermann. “Do not position them as a ‘checkup’ or ‘report card’ on any given lawyer. Rather, position them as a way to provide better service, acquire intelligence on competitors and find new work.

“In Zeughauser Group’s experience, general counsel like to participate and find CSIs very therapeutic,” said Zimmermann. “At the end of an interview, we often hear ‘I hope you will be coming back to do this again next year.’”

The CSI should not be conducted by the relationship partner. “The client will not be as candid with this person,” said Zimmermann. “CSIs

*(Continued on page 14)*



can be conducted by the firm's chairman or a senior partner – someone whose attention will 'honor' the client and whose authority within the firm will ensure compliance with feedback." Alternatively, CSIs can be conducted by a skilled outside consultant.

There are five stages to an effective CSI pilot program:

**Design for success.** "Initially, work only with partners who understand how this process can bring them more work," said Zimmermann. "Never twist the arms of reluctant or hostile partners to make them participate in your pilot. They will just drag you down – along with the entire process."

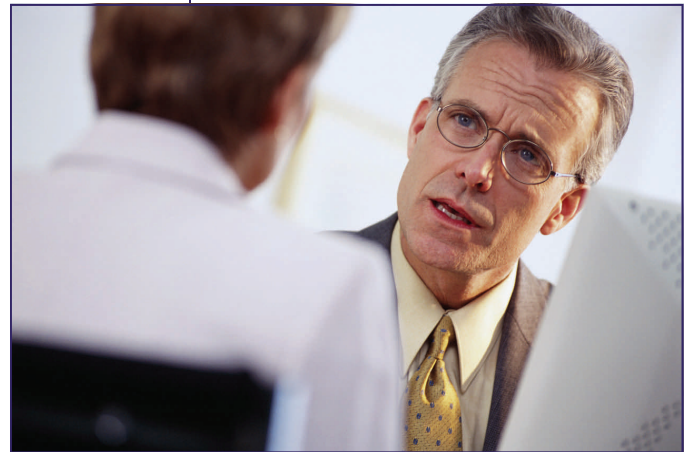
**Start with just five clients.** "Do not try to do too much at first," said Zimmermann. "Aim to do a focused job with five clients rather than spreading yourselves too thin with many clients."

**Use a tiered system.** "Consider putting the firm's clients into three tiers," said Zimmermann. "Tier one might include clients that are largest in terms of revenue. Tier two might include satisfied clients with potential for growth. Tier three might include clients with known issues – troubled relationships that the firm wants to get back on the rails. For your pilot, choose clients from tier two."

**Sell your success.** "Empirical and anecdotal evidence of success (from your carefully selected, tier-two, low-hanging fruit) should be shared throughout the firm," said Zimmermann. "Use this evidence to demonstrate how the CSI process works and the value it provides – and to sell the initially wary partners."

**Get ready for business.** "Once you have demonstrated success with your pilot program, expect a second wave of interested partners to line up at your door," said Zimmermann.

Because of the challenging economic environment, general counsel are expecting much more from their law firms – and are much more likely to abandon firms that do not take active steps to meet those expectations. CSIs are a best practice among successful law firms - and part of the bedrock of any solid client-care and loyalty program.



*"CSIs can be conducted by the firm's chairman or a senior partner – someone whose attention will 'honor' the client and whose authority within the firm will ensure compliance with feedback."*



Colorado Association of Law Libraries Executive Board Meeting  
October 7, 20120  
Faegre and Benson LLP,  
1700 Lincoln Street, Denver,  
4:15-5:07 PM

Present at meeting:

**Board Members:** Rachel Compton (President), Robert Linz (Vice President/President Elect), Tracy Leming (Immediate Past President), Tamara Phalen (Treasurer), Chris Hudson, (Secretary), and Rachel Nelson (Member at Large).

**Committee Chairs:** Anne Lucke (Membership Committee), Amy Levine (Newsletter Committee), Stephanie Noble (Newsletter), and Kelly Fanning (Brown bag Committee)

**CoALL Members:** None

The meeting was called to order, and the minutes from the prior meeting of June 10, 2010 were approved.

#### I. President's Report – Rachel Compton

##### Chapter Liability Insurance

Rachel Compton reported that chapter liability insurance is due this month (10/20). The insurance fee is \$1.00 per member. Tamara Phalen reported that the process only involves a form and a check. Tamara asked whether we include the lifetime members in the count for liability insurance purposes (we currently have 96 members and 5 lifetime members). She will follow up with AALL regarding the lifetime members question and will cut a check for 96 or 101 dollars depending on the response received.

##### New Webmaster/Listserv owner

Rachel Compton reported that Theresa Baker has resigned from her duties as webmaster/listserv owner. She will be replaced by John Moss. John is employed at HRO.

##### Public Relations chair

Rachel Compton reported that Meg Martin has resigned from her position as the Public Relations committee chair. Rachel suggested we reconsider the duties of this position, perhaps to include some party planning or other responsibilities. Tracy Leming reported that we've done a table at the American Legal Managers symposium, and that there had been discussion in the past about creating something with the CoALL logo to hand out. These

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responsibilities could be included in the Public Relations chair's duties.

Kelly Fanning suggested posting the opening on the listserv. Rachel will post the position to the listserv with the duties.

## II. Vice President's Report – Robert Linz

Robert Linz reported on the progress of a membership survey. He said that the CoALL President had done an annual survey in the past. In the past, surveys were reported in Scuttle. Robert found survey from 2004. The survey is currently in the initial planning stages.

Tamara reported that she is doing budget survey. Anne Lucke would like to include a question about increasing dues or a question about to the value of CoALL membership in relation to the cost of dues.

Robert reported that he will be the CoALL representative for this year's Colleague Connection event. The event committee is chaired by Julie Cavender of RMSL. Robert also reported that CU has volunteered to be the Spotlight on your Career location for 2010.

## III. Treasurer's Report – Tamara Phalen

### General Update

Tamara previously submitted a report. At the meeting she reported that the tax filing is due Nov. 14<sup>th</sup> and the post office box expense is due in November. She will be going a virtual treasurer's training session with Dona Rodriguez later this month.

### Ad-hoc Committee for Budget Planning

Tamara reported on the creation of an ad-hoc committee to study CoALL budgets. The committee would focus on how CoALL might address the annual shortfall and set budget guidelines to direct how the budget will be used each year. Tamara will take responsibility for creating the committee's charge by November 1. She suggested that a report could be ready by the end of January, possibly to coincide with the membership survey.

The committee will consist of 6 members, one person from each membership category (firm/private, academic, court, student, other). Rachel Compton will have the tie-breaking vote. Tamara will be in charge of recruiting members to the committee.

## IV. Past President's Report – Tracy Leming

No report

## V. Library School/Recruitment Committee - Diane Forge Bauersfeld



Rachel Compton reported that Diane Bauersfeld submitted an update by email. Diane has put the word out to LIS students about the benefits of CoALL membership and has generated interest from 2 new LIS students.

#### VII. Membership Committee - Anne Lucke

Anne Lucke reported that the membership drive for this year is done. We currently have 96 members (64 active, 20 associate, 12 students, and 5 lifetime). Membership is down from last year, but those leaving the organization generally did so for reasons like retirement or relocation. There were 2 fee waiver requests for members that had recently lost their jobs. The membership directory on the website is updated and current. There were several (not many) members that checked volunteer boxes on the renewal form: Rachel Compton has the list of potential volunteers.

#### VIII. Grants & Scholarships Committee - Kathy Carlson

Rachel Compton reported on an email from Committee Chair Kathy Carlson. Kathy posed the question of whether CoALL will continue to offer the \$1000 LIS scholarship. Discussion regarding the value of the scholarship and its effect on the CoALL budget lasted for approximately 10 minutes. Robert Linz moved to approve \$1000 for the scholarship budget. Motion carried.

#### IX. Newsletter – Amy Levine

Amy Levine and Stephanie Noble reported on the Scuttle newsletter. They said that they want to make newsletter less static, maybe more of a blog format, so that it is more current. Robert Linz suggested they talk to Katy Lynn. He also suggested that the benefit of publication is that it is a publication and that blog doesn't have the same scholarship quality. Stephanie replied that the 10<sup>th</sup> Cir. does both (they pdf the blog and then publish something quarterly). She also asked what purpose the board saw the newsletter serving—Highlight the members? Provide information? Tracy Lemming reminded the board that it's in the by-laws that Scuttle is the official publication for our minutes. Rachel Compton suggested doing a newsletter and a blog. Robert agreed that the two could complement each other. Chris Hudson noted that Scuttle is a good avenue for students to publish. Tamara Phalen suggested using the listserv for updates. Robert suggested working with John Moss to create a blog that incorporates Web 2.0 tools. Rachel acknowledged the value of a blog. She also reported that AALL is currently updating their website and that the changes will affect chapters next year. Rachel said she will look into whether we will be able to put blog on the website with the new AALL changes. Tamara suggested adding a question about the newsletter/blog to the member survey. Amy said that they will put out a call for articles and that the newsletter will go out after the October 15, 2010 target.



**X. Brown Bags – Kelly Fanning**

Kelly Fanning reported that the brown bag sessions are scheduled for the upcoming year and that a tentative calendar is set.

**XI. Government Relations – Madeline Cohen**

No report.

**XII. BRAG – Stacey Bowers**

Rachel Compton reported on Stacey Bowers' update email. This year BRAG will be a 90 minute event held at law firm at no cost for associates to attend. The event will include breakout sessions in 2-3 tracks with presentations running 20-30 minutes each. Stacey will be looking for volunteers in the next few weeks.

**XIII. New Business**

**CoALL's Involvement with Spotlight 2011 – Esti Shay**

Esti Shay submitted an email report to Rachel Compton. Board members Kelly Fanning and Rachel Nelson are on the Spotlight Committee. Robert Linz reported that CU can host the event. Rachel Nelson reported that according to Shanon O'Grady, RMSLA will match what CoALL has given in the past. Robert said that CoALL pledged \$1,500 in the past and that last year both organizations paid out about \$200. Tamara Phalen stated that Spotlight is budgeted for \$100 in this year's budget. Robert said that we've talked about trying to make this a positive revenue event, but in the past it's been close to break even. The Board authorized up to \$1000 for the expenditure.

**Alphabet Soup Reception – suggested dates – Tamara Phalen**

Tamara Phalen reported that she is in process of setting up an alphabet soup reception. She's would like to include members of RMSLA, CoALL, CAL, & DU LIS to encourage cross socialization between these groups. She is looking at dates in January. The only conflict dates at this point are Jan 7-11 (ALA midwinter). Location: Breckenridge Brewery. She suggested that each organization put in \$100. The Board is favor of this event. Tamara will follow up with the various organizations and report back to the Board.

**Member Survey – Rachel Compton**

Discussed previously.

**Holiday Party Date and Planning**



Rachel Compton suggested doing the chapter visitor in the spring instead of in conjunction with the holiday party. Robert Linz suggested that the March meeting coincide with the chapter visit. Tamara Phalen said she does not want to be responsible for planning the holiday party this year. Rachel will ask for volunteers. Robert suggested Karen Selden. Last year's party was held on the 2<sup>nd</sup> Thursday of December.

The meeting adjourned at **5:07 PM**.

Respectfully submitted,

Chris Hudson  
CoALL Secretary