FALL 2001 NEWS BULLETIN

Beyond Management LLC

Computer and Management Consulting

Building Your Business

Maximize Your Year End Reports To Build Your Business

By Neil Quateman

■ If you're managing a business, you're starting to think about year end reporting - and if you're not, aren't you glad we're reminding you? There they loom: tax returns...employee evaluations... business and profit summaries.

Actually, reports like these are perfect strategic planning tools for any business or law firm interested in growth and marketing.

Can you evaluate what you're billing versus what you're capable of billing? If time is the issue for your business, you want to consider if your revenue-generating staff members are billing to their capacity. Are you furnishing them with the work to have billable time? Maybe they're doing plenty of work, but have to write too much of it off to mistakes or inefficiency.

Here are some reports you can generate that can help you analyze such important questions and their answers:

◆ GROSS BILLINGS

Sometimes you want to look at billings by client, sometimes by gross revenues of each firm member. For law firms, you can also analyze revenue based on each area of legal practice (something you need in a malpractice insurance application).

*Reports from **Timeslips** that can assist you in this area include the Invoice Listing (found in the A/R Transaction report group on the report menu). Consider changing the Sorting tab (for viewing totals by client versus timekeeper). Another is the Summary Listing (found in the Slips report group). Be sure to change the Formats tab to include the billed value of each slip.*

***PCLaw** offers the Billable Time Summary by Working Attorney, which shows both billed and unbilled time by attorney.*

◆ COLLECTIONS

Are you monitoring your collections so you'll get paid on a timely basis? Are some of your workers doing work you're more likely to get paid for whereas others aren't? Are you able to track and analyze adjustments to your receivables, like courtesy credits and writing off bad debts? You need this information to manage your business!

*Reports from **Timeslips** that can assist you with Collections include the Payment Performance (found in the A/R Transaction report group). Consider changing the Sorting tab (for viewing by client versus timekeeper), and think about marking the Formats tab to remove costs. Custom reporting in **Timeslips** can help you to evaluate write-offs, adjustments and credits (see Page 3 for details on our helpful **Timeslips Reporting** class).*

***PCLaw** is strong on collection reports, including a Collection Summary report that shows collections for both fees and disbursements and a Fees Collected Summary.*

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Mini Alerts

Improved Timeslips Link with Quickbooks.

■ Intuit, the publisher of QuickBooks, selected Timeslips as one of only 20 products to participate in its new software development program. We're hoping to see the results of this important development with a product being released before the early part of 2002 that will provide an effective two-way link between Timeslips and Quickbooks.

News About Timeslips v8 & v11

■ Sage is hard at work on a substantial new version of Timeslips. Timeslips version 11 is expected to be released sometime in 2002. This new version will run on the Microsoft database engine (MSDE) rather than the Paradox engine it currently uses for small firms or the MS SQL database for larger firms. This change is to gain a greater degree of stability for your billing data.

■ When v11 is released in 2002, Sage has announced that it will stop offering technical support on the older product, Timeslips Deluxe v8. So if you've been thinking about it, you may want to upgrade from v8 sooner rather than later.

Maximize Your Report-Making Capability! Check Out Our **Timeslips Reporting Class** on Page 3.

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SEE BACK FOR SCHEDULE OF CLASSES AND INSIDE FOR ENROLLMENT FORM

We Adopt, Adapt and Improve

Get Caught Up In Our New Easier-To-Use Web Site

SAVE TIME -- ENROLL DIRECTLY WITHOUT PHONE OR FAX

by Isabel Page

Almost every business has a Web site these days - and for good reason. A well-designed Web site geared to your client's needs can be a tool as important as a hammer is to a nail.

So that we can hit the nail right on the head we have completely revamped **www.beyondmanagement.com.** Now it's a dynamic site that allows you to do things directly that you used to have to do by phone. We're very excited about the convenience it offers you. Now you can:

- Enroll in a class
- Use a credit card to pay for a class on a secured line
- Receive enrollment confirmation by e-mail
- View our classroom
- Print a map of our location
- Access and search expanded descriptions, curriculum and class schedule
- Retrieve documents from our Tips & Documents section
- Subscribe to our e-mail newsletter.

Personally, I think it's terrific! The best part is that it makes it so simple to enroll in a class. You can review what each class covers or what level you should be at to take it. And you receive prompt confirmation that your enrollment was received (with your actual acceptance confirmed later after your payment is processed).

Your Input Welcome

We are always looking to adopt, adapt and improve, so we urge you to let us know if we can make anything on our site more helpful to you.

We continue to work with our capable and creative Web site design company, Enthusiast, Inc., and programmer Jonathan Watson, so, contact us anytime.

The convenience of our new Web site awaits you at: **www.beyondmanagement.com**

Unsolicited Letter - We Swear!

Dear Neil:

Congratulations again on your Worldwide Outstanding Certified Consultant (CC) award for 2000-2001. This makes your 6th consecutive annual award.

Please recall that you and your company not only received the best Outstanding CC award for the Western states region, but you were also the best Outstanding CC from either of the other two regions. Hence the Worldwide designation.

Thank you and all the folks at Beyond Management for all your hard work and dedication to selling and supporting Timeslips. Congratulations also for being re-elected to the Timeslips Steering Committee. You and your staff exemplify the winning attitude that both Timeslips and your customers use as a benchmark.

Sincerely,

Larry R. Dean
Timeslips Channel Manager
Sage U.S. Holdings, Inc.

No-Cost Demonstrations of Time Matters and the LexisNexis Link

By Michael Flores

(Available For A Limited Time)

Attention: Lawyers, paralegals and administrators, or anyone using online research. Beyond Management is pleased to offer three monthly no-cost demonstrations in conjunction with LexisNexis Corporation and Time Matters software.

I will be joined by a representative of LexisNexis to demonstrate to users and potential users the new version of Time Matters v4 along with the new LexisNexis research module.

The idea behind the module is for users of Lexis to have the ability to do their research within Time Matters, with those searches being saved and categorized.

The 1-hour session, which includes the demonstration and a Q&A period, will be from 11 a.m. to noon at the Beyond Management classroom on the following Fridays: September 28th, October 26th and November 30th.

Space is limited, so please make reservations. Call us at **310-286-6888** or use the Web site to enroll - there's no cost except parking.

We support the following software which we sell at 10% off:
Timeslips, Time Matters, PCLaw Amicus Attorney and QuickBooks

The Automated Office

Bringing Law Firms Up To Speed On Microsoft Word

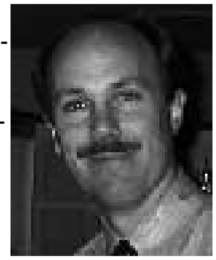
By Eric Crowther, Independent Consultant

With the increase of sending and exchanging documents via computer, law firms of all sizes are under pressure these days to use the same word processing program as their clients, which in most cases means **Microsoft Word**.

Contrary to claims you may have heard, documents simply do not convert smoothly between WordPerfect and Word.

Unfortunately, WordPerfect and Word structure and format documents in an entirely different manner, which means that WordPerfect users face a steep learning curve when starting to use Word. If a firm makes a conversion to Word without adequately training its personnel, it is in danger of generating not only frustration, but also a tremendous loss of productivity.

It has become clear that attorneys, paralegals, assistants and legal secretaries all need to become proficient in Word in order to remain competitive in the legal field.



Unlike most general Word classes, the three classes we are offering initially - **Basic, Advanced and Litigation** - are designed specifically to meet the needs of people in the legal community, focusing on the tasks that law firms carry out on a daily basis. Participants will learn how to create documents typical of the legal profession and how to work effectively with documents created by others. We train you using realistic exercises and examples.

Law firms also will find that sending people to our classes may be more efficient than arranging for on-site training, where the logistics can be complicated and the interruptions plentiful. With its state-of-the-art equipment and design, the Beyond Management classroom is the perfect teaching environment.

I have developed a curriculum for teaching Word that helps people understand and feel comfortable with the program as quickly as possible. My teaching method is very effective because I focus on the tasks you face in your daily work.

My favorite feedback is when people say that in three hours I've helped them with something they've been struggling with for three months. If you attend these classes, I look forward to bringing you up to speed quickly and banishing to the past the unnecessary aggravations of your firm's inevitable decision to make the transition to Word.

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◆ **COUNTING**

Does your firm need to know how many new matters came in, have closed or been resolved this day, month or year?

Time Matters v4 *custom reporting now has the ability to add a count for the number of items that are included in a report (e.g., "How many new matters were added between July 1 and December 31?"). Custom reports can be added from the Report Specifications screen.*

◆ **ACCOUNTING**

Any business, of course, depends on the Profit & Loss and the Balance Sheet reports. But don't stop there!

In addition to the standards, ***QuickBooks*** *can generate such reports as Cash Flow, 1099s and W-2s.*

Whatever your need, rest assured that essential reports like these can be set up by your software programs to be a button-push away. As for the tricky part of knowing *which* button to push - that's what we're here for.

A Word About Eric

By Neil Quateman

Independent consultant, programmer and trainer, Eric Crowther and I have known each other for years. We often find ourselves working for the same clients. I am excited that we are now joining forces to be able to use our Beyond Management classroom to offer the legal community the benefit of Eric's vast expertise delivered so easily within his personable and highly effective teaching style.

Eric has worked exclusively within the legal industry since 1984. He has a B.S. in Information Systems Management from the University of San Francisco College of Professional Studies. His varied corporate and consulting background includes network administration, user training and support, and custom macro programming.

I welcome Eric to Beyond Management and invite our clients to take advantage of the opportunity for this highly useful set of classes.

Reporting on Our

Timeslips Reporting Class

This popular class offers great value by training you to fully utilize the incredibly useful reporting features already built into **Timeslips**, such as:

- **Report Flexibility**
- **Custom Report Designer**
- **Data Exporting Ability**
- **Use of Third Party Products**

While we touch on each of these variants, the crown jewel of the class is working on the techniques and skills necessary to:

- **Build a Realization Report**

A Realization Report has two elements:
Billing and Collection
To clarify - you work 150 hours a month, but want to know how much is billable to a client. The answer is in your:

Billing Realization Report

You billed 140 hours in a month, but want to know how much of that your clients actually paid. The answer to that is in your:

Collection Realization Report

Make sure your firm is getting the helpful reports it can get with this important class.