

*“Working towards my CLM certification was the best thing I’ve done for myself in a long time. The wide range of knowledge that you will cover while studying for this exam, makes you feel like you can take on any task, even if you have never done it before. It was a lot of work, but well worth it.”*

*Dorothea M. Downey, CLM, Financial and Office Systems Manager,  
Weingarten, Schurgin, Gagnebin & Lebovici LLP, Boston*

## HOW TO DETERMINE WHAT EDUCATION QUALIFIES FOR CLM<sup>SM</sup> CREDIT

These instructions seek to answer the question: What constitutes CLM credit for a program?

To start, we need to first look at the Education Requirements required of *all CLM Exam Applicants*, as laid out on page 6 of the CLM Information and Application Packet ([www.alanet.org/clm](http://www.alanet.org/clm)).


### ALL CLM APPLICANTS

To apply to sit for the exam, ALL CLM APPLICANTS must meet certain experience and educational requirements.

*In terms of education, ALL CLM applicants must provide, within the 24 months preceding the date of their application, a minimum of 120 minutes of course work in each of the following five (5) Management Categories:*

1. **WRITING SKILLS** (e.g., writing memos, policy manuals, proposals, job descriptions)
2. **COMMUNICATION SKILLS** (e.g., oral presentations to staff and lawyers, interpersonal relations, interactions with clients and vendors, performance counseling, client contacts)
3. **SELF-MANAGEMENT SKILLS** (e.g., stress management, time management, project management)
4. **INFORMATION TECHNOLOGY** (e.g., features and capabilities of computer and network hardware and software systems, including general purpose packages like spreadsheets, database programs and word processing applications, as well as specialized software systems supporting practice management, including financial analysis and management; training in the use of computer systems like word processing and accessing informational databases)
5. **ORGANIZATIONAL DEVELOPMENT** (e.g., leadership styles and techniques, team development and management principles, organizational development techniques such as change management, negotiation and conflict management techniques)

*Thus, CLM credit refers (only) to the general educational requirements, i.e. the Management Categories, required of all CLM applicants.*

You will see the CLM logo  or other CLM designation if CLM credit is being given to a session at one of the ALA conferences - Annual, Regionals, Retreats, and Specialty conferences (ex: Financial Management, Extraordinary Law Firm, etc.).

If there is no CLM logo or other CLM designation at one of ALA’s conferences, the session does **not** fulfill a CLM applicant’s *general educational requirements*, i.e. does not fulfill one of the five

Management Categories. However, see the *additional* educational requirements below for Functional Specialists.

### **FUNCTIONAL SPECIALISTS**

In addition to fulfilling the five Management Categories listed above that are required of all CLM applicants, Functional Specialists\* must also fulfill an ***additional 15 hours of coursework distributed in areas other than the field in which the functional specialist is primarily employed.***

### **Subject Areas for Functional Specialists**

<b>(HR) Human Resources Management</b>	<b>(FM) Financial Management</b>	<b>(OM) Operations Management</b>	<b>(LI) Legal Industry/ Business Management</b>
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It is therefore possible to offer a seminar that does *not* qualify for CLM credit – i.e. it does not fulfill one of the five Management Categories – but covers one of the *additional* subject areas needed by the CLM applicant who is a Functional Specialist. For example, *Finance for the Non-Financial Manager*, is a Financial Management subject which does not fall under any of the CLM Management Categories, but may be a subject needed by a Functional Specialist such as Human Resources Manager to fulfill the HR Manager’s required additional hours.

This subject could also be used for *recertification* (see page 6) by those who already have their CLM designation.

### **HOW TO DETERMINE WHAT FULFILLS THE MANAGEMENT CATEGORIES**

**The following are examples of coursework that fulfill the Educational Coursework Management Categories that must be completed by ALL CLM applicants. Each example is followed by one that does NOT fulfill that category.**

#### **WRITING SKILLS**

***The following example fulfills 1.5 hours of CLM credit in the Writing Skills Management Category***

**Session Title: Write Better Right Now**

**Time: 9 – 10:30 A.M.**

**Description:** Learn how to write effective internal communication, including e-mail. This back-to-basics class covers classic grammar “gotchas,” such as when to use which or that and who or whom. The presenter will also share a trick you can use to increase the power of your writing style, and identify strategies good writers use to capture the attention of their readers.

\*HR Managers, Finance Managers, IT Managers, etc. – see *Job Descriptions* on page 17 of the CLM Information and Application Packet, [www.alanet.org/clm](http://www.alanet.org/clm).

**Analysis:** Any instruction that seeks to improve one's written skills qualifies in this category. This session covers grammar, usage, and writing style, basics skills that are essential to good writing. It therefore qualifies for CLM Credit in this Management Category.

*The following example does NOT fulfill CLM credit in the Writing Skills Management Category.*

**Session Title: Career Development: Résumé Writing and Interview Skills**

**Time: 9 – 10 A.M.**

**Description:** You may plan an active role in the hiring and managing of law firm staff, but how prepared are you to find a job and successfully market yourself in today's changing economy? This hands-on workshop will help you move beyond the basics of résumé writing and job hunting. Discussion topics include the current hiring environment, weathering a career transition, career management tips, developing a career plan, résumé writing and interview tips, marketing yourself, networking, and job search challenges.

**Analysis:** To determine CLM credit, one needs to look at the *main focus* of a session and decide if its focus is clear and true. Based on both the title and the description of this session, which states that it intends to concern itself with going 'beyond the basics of resume writing,' it is clear that the main focus of this session is not about learning resume writing skills but rather on all the factors that contribute to conducting a successful job hunt. Thus this session does not qualify for CLM credit in the Management Category of Writing Skills.

#### **COMMUNICATION SKILLS**

*The following example fulfills 1 hour of CLM credit in the Communication Skills Management Category.*

**Session Title: Persuasive Communication: How to Win Anyone Over to Your Point of View**

**Time: 9 – 10 A.M.**

**Description:** Every time you try to persuade - whether it's one person or a large group - you may assume your success is based on what you say and how you say it. Learn how to map out your argument so that you stay on track and present a concise, compelling case, monitor your communication style to ensure you set a prepare-listen-speak rhythm, and detect verbal and nonverbal cues that shape how you pitch your ideas.

**Analysis:** This session is all about improving communication styles, both verbal and nonverbal. It easily fits into the Communication Skills Management Category, which includes both oral communication skills and interpersonal relation skills.

*The following example does NOT fulfill CLM credit in the Communication Skills Management Category.*

**Session Title: The Mentoring Cycle-Offering an Edge in Competitive Labor**

**Time: 9 – 10 A.M.**

**Description:** Learn the pitfalls of incompatible mentoring partnerships and the many ways you can use mentoring to engage employees, enforce your firm's strategic planning, create a valuable career professional development opportunity for your attorneys, strengthen your diverse culture and increase morale.

**Analysis:** While mentoring involves communication skills, this session is not about learning the necessary communication skills to mentor. Its *main focus* is on the value of mentoring to a firm's morale and culture. It therefore does not qualify for CLM credit in the Management Category of Communication Skills.

#### SELF-MANAGEMENT SKILLS

*The following example fulfills 1 hour of CLM credit in the Self-Management Skills Management Category,*

**Session Title: Break the Cycle of Stress: Skills for Health and Peak Performance**

**Time: 10 – 11 A.M.**

**Description:** Give yourself the skills you need to perform effectively under high pressure. By breaking the cycle of stress, you can enhance communications and productivity at your firm and dramatically benefit your personal life. The principles and techniques you learn in this session are essential for successful leadership, self-mastery, focus and ability to work effectively with others.

**Analysis:** To meet the criteria of the Self-Management category, sessions must clearly lay out how to master a particular skill and the skill being taught must clearly and tangibly benefit the organization. Thus, the session must be about acquiring and/or improving in a skill that benefits one's self *and* one's job, such as Time Management, Problem-solving, and Stress Management.

*The following example does NOT fulfill CLM Credit in the Self-Management Skills Management Category.*

**Session Title: Choices – You Are What You Choose**

**Time: 9 – 10 A.M.**

**Description:** The choices you make create your results. In this motivational session, participants learn the secret which 99 percent of the population does not know. They are asked to examine the types of choices they routinely make – and rethink how to get optimal results through a change in personal choices.

**Analysis:** Quite often, when a session is motivational in nature, the focus is solely related to personal growth. In addition, personal well-being is unfortunately one of those areas that can be hard to define, and even harder to measure in terms of what skill is being taught or its value outside of personal well-being.

Therefore, to qualify in the Self-Management category, a session must satisfy two key questions: what skill is being taught *and* is it directly and tangibly job-related?

**INFORMATION TECHNOLOGY**

***The following example fulfills 1.25 hours of CLM credit in the Information Technology Management Category.***

**Session Title: Electronic Client Service: Extranets**

**Time: 10 – 11:15 A.M.**

**Description:** In this session, the speaker will discuss how an extranet can provide better service by giving clients access to their files. But, like any new technology, there are ethical and security questions that must be addressed. This open service works best for clients that appreciate the ability to access their own documents rather than those who prefer to have their documents digitally delivered by the firm.

**Analysis:** This session covers the “how to” features of an extranet. Moreover, ethical and security aspects are also covered which in this case, are important features, for an administrator can not roll out an extranet without the appropriate security in place.

Other IT sessions may provide a skill set in a particular software (ex: Microsoft Access, Excel, PowerPoint, various types of Financial Software, etc.) and thus also fulfill the “features and capabilities of computer and network hardware and software systems,” one of the areas defined as fulfilling the Information Technology Management Category.

***The following example does NOT fulfill CLM credit in the Information Technology Management Category.***

**Session Title: Electronic Marketing**

**Time: 10:30 – 11:30 A.M.**

There are many ways to market your firm electronically. In this session, the presenter will discuss real-world electronic marketing ideas, such as blogging, podcasts, Webinars, YouTube, social networking, e-mail marketing, Web sites, electronic newsletters, and more. Each of these marketing channels involves some staffing issues to monitor and maintain the system. In addition, some marketing such as associate blogs, carry considerable risk to the firm and branding. Learn some of the new electronic marketing channels, the advantages and disadvantages of various electronic marketing channels and uncover the mix of marketing tools that best meet your firm’s needs.

**Analysis:** This session’s main focus is on *marketing* certain technologies – not how to operate or use these technological tools, but how the tools can be used to market your firm. Therefore this session holds no CLM credit in the IT Management Category.

**ORGANIZATIONAL DEVELOPMENT**

***The following example fulfills 2 hours of CLM credit in the Organizational Development Management Category.***

**Session Title: 7 Tips to Build a Strong Work Team**

**Time: 8 – 10 A.M.**

**Description:** To build a high-achieving work team, first you need to clearly identify and communicate your organization's objectives, then align team members' strengths, egos, and personal interests with those objectives. Discover proven effective strategies to sharpen your team-building skills and maximize team productivity.

**Analysis:** Although communication skills are a necessary component of team-building, the *main focus* of this session is how to build an effective team and increase team productivity. Team-building is one of the skills under Organizational Development, thus this session qualifies for CLM credit in this Management Category.

**The following example does NOT fulfill CLM credit in the Organizational Development Management Category.**

**Session Title: Grief in the Workplace**

**Time: 8 – 9 A.M.**

**Description:** Death, divorce, terminal illness: How do successful law firms manage interpersonal crises in the lives of employees and still maintain productivity? During this session, participants will explore the states of grief and appropriate firm responses and procedures, and discuss the psychological, physical, social, economic and spiritual impact of grief.

**Analysis:** The main focus of this session is on handling employees experiencing Loss, and while this is a very valuable Human Resource skill, it is not one of skills under the OD Management Category (e.g., leadership styles, team development, management principles, change management, negotiation, conflict management techniques). It therefore holds no CLM credit.

**RECERTIFICATION**

Once you hold the CLM designation, you must continue your education and recertify every three years. To recertify, you must obtain 36 hours of education, including one hour of Substance Abuse and one hour of Business Ethics. A minimum of three hours per Subject Area is required. These Subject Areas are shown in the chart below:

**Subject Areas for Recertification**

<b>(HR)</b> Human Resources Management	<b>(FM)</b> Financial Management	<b>(OM)</b> Operations Management	<b>(LI)</b> Legal Industry/ Business Management	<b>(CM)</b> Communications and Organizational Management	<b>Substance Abuse</b> (1 hr)	<b>Business Ethics</b> (1 hr)
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## **FREQUENTLY ASKED QUESTIONS**

We receive many frequently asked questions about certification. Here is a sampling. If you have suggestions to add to this area, please contact Sue Powers at [spowers@alanet.org](mailto:spowers@alanet.org).

- **Can other seminars that don't have the CLM designation count as CLM credit?**

**Maybe.**

- Sessions that qualify for CLM credit at ALA's Annual Conference, Regional & Specialty Conferences, and Retreats, have been designated as such in our brochures and listed on our CLM Credit Form (available onsite). Thus, at these ALA conferences, sessions holding CLM credit are already designated and only these designated sessions hold CLM credit. But remember, CLM credit refers to sessions that fulfill the general educational requirements for *all* applicants. The CLM credit designation does *not* refer to those additional subject areas needed by Functional Specialists, or those needed for Recertification.
- ALA Chapters, universities, colleges, workshops and others may offer sessions that qualify for CLM credit. One needs only to determine if the session fulfills one of the CLM Management Categories.

- **Do CLM sessions count toward Recertification?**

**Yes.** All CLM sessions fall under the umbrella of one of the Subject Areas, such as *Electronic Client Service: Extranets* which falls under Operations Management, one of the areas that those recertifying need to fulfill.

- **Do Chapter seminars need to get pre-approved for CLM credit?**

**No.** However, if your chapter is putting on a seminar or a conference but is unsure what counts towards CLM, please feel free to seek advice from ALA headquarters.

- **What counts for Recertification?**

**Almost any subject** counts for recertification. See Competencies by Subject Areas on our Recertification page at <http://www.alanet.org/education/recert.aspx> for a comprehensive list of the topics that fall under each Subject Area.

Thank you! We hope this information will be helpful in putting together chapter programs, applying to sit for the CLM exam, or seeking recertification. If you have a question not answered here, please contact Sue Powers at ALA headquarters at [spowers@alanet.org](mailto:spowers@alanet.org), 847.267.1394.

*"Studying for and passing the CLM exam validated for me that I do indeed possess a high level of knowledge in the many facets of law office administration. It's a terrific feeling and I would encourage other ALA members with similar tenure to do the same!" Mary Hilcoske, CLM, Administrator, DeLisio Moran Geraghty & Zobel, PC, Anchorage, AK*