

**CLM<sup>SM</sup>**  
*Certified Legal Manager*

**GUIDE TO DEVELOPING A  
CERTIFIED LEGAL MANAGER (CLM)<sup>SM</sup>  
STUDY GROUP**

CLM<sup>SM</sup> IS A SERVICE MARK OF THE ASSOCIATION OF LEGAL ADMINISTRATORS  
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## **INTRODUCTION**

Before you read any further, you are to be congratulated for your initiative in seeking to form a study group for Certified Legal Manager (CLM)<sup>SM</sup> accreditation. Becoming a life-long learner in one's profession comes with daily rewards. Your efforts in forming and participating in a CLM<sup>SM</sup> study group will become a gift to yourself and to others.

## **THE PURPOSE**

The purpose of this guide is to assist chapters in the development and design of study groups for the Certified Legal Manager (CLM)<sup>SM</sup> examination. Areas addressed are:

- Determining interest within the chapter and the needs of the group participants
- Structuring and planning for the study group
- Identifying content to be included in the session
- Selecting and working with presenters and speakers
- Logistical concerns for planning and conducting a study group
- Budget considerations

To best use this information, this manual should be used in conjunction with the [CLM<sup>SM</sup> Information and Application Packet](#) located online. Questions can be sent to [certification@alanet.org](mailto:certification@alanet.org)

## GETTING STARTED

Like any major undertaking, PLANNING is of paramount importance. It is recommended that your chapter allow at least 3 months from the starting point of determining and generating interest to the first official meeting of the study group.

### DETERMINING INTEREST

There is no set number of participants required to begin and conduct an effective study group. The logistics of how the group is structured may vary, but the key is interest and commitment. All of the normal modes of chapter communication including e-mail, announcements at chapter meetings, flyers and word of mouth can be used successfully to determine general interest. It is recommended that whichever communication mode is chosen, the initial communication target is a broad base of chapter members who may have a variety of interest levels.

You are apt to find interested individuals both old and new to the profession, those with overall knowledge of the role of a legal administrator and those who specialize in a few areas, and at all stages of the CLM<sup>SM</sup> exam preparation process. You can also expect to find individuals who don't aspire to attaining the CLM<sup>SM</sup> designation, but are solely interested in gaining knowledge and networking through a group study.

Once you've determined you have individuals interested in pursuing a study group, you will want to begin thinking about how these factors will influence your planning:

- size of your interested group
- chapter resources (financial, knowledge base, contacts, etc.)
- geographic location of interested individuals
- group goals
- individual goals

### PLANNING GROUP STRUCTURES AND ORGANIZATION

To date, most of the CLM<sup>SM</sup> study groups interviewed have incorporated some form of planning committee structure, though very successful groups have been formed and conducted through the efforts of an individual taking responsibility for the entire program. A committee of 3-6 individuals is generally most efficient. Sharing the responsibilities for planning and conducting the study group will help to ensure a broad perspective, that no one becomes overly burdened with tasks and that the group does not "stall-out" if someone must shift priorities away from the study group. If possible, include a member who has already achieved the CLM<sup>SM</sup> designation to assist in determining content that will be covered. For larger groups (12+ participants), you may want to consider dividing responsibilities into the following categories:

A Chairperson or co-chairpersons responsible for scheduling planning sessions, moving the group forward and ensuring that communication occurs within the group. The chairperson(s) also serve as the liaison to the chapter leadership.

Registration: If your study group is large, you may consider having people register as an indication of commitment. You may choose to have a fee for participating in the study group depending on expenses you think the group will incur for speakers, refreshments, resource materials, duplication expenses, meeting rooms, etc. Having one person responsible for handling registrations and collection of fees will streamline the process.

Logistics: One or several individuals responsible for obtaining meeting space, set up, audio visual equipment, refreshments, etc.

Duplication and Supplies: One or several individuals responsible for securing or providing duplication of session materials and providing necessary supplies (pens, notebooks, staplers, whole punch, etc.) This person(s) may also be responsible for keeping a historical file of materials presented for future use or for those who miss a specific session.

Resource Librarian: Pages 15-16 of the [CLM<sup>SM</sup> Information and Application Packet](#) details potential resources for study. Your group may find it useful to collect these and other resources to form a lending library with one person responsible for checking books in and out.

Speaker Liaison: One or several individuals responsible for presenters/speakers. This may include contacting and negotiating with recommended speakers, securing written materials from the speakers for duplication, making arrangements for honorariums if required, greeting and introducing speakers when they arrive at the session, writing thank you notes to speakers, etc.

***Groups of less than 12*** – The planning and organization structure will likely be much less formal. It is probable that each member of the group will take on some responsibility for several areas covered above.

***Pairs and Trios*** – If you find there is not interest in your chapter in forming a study group or you are unable to attend group study, finding a study partner or two may be beneficial. Having set meeting times alone will provide the discipline to study. Working together through suggested topics and resources will allow for the sharing of knowledge and identify areas of strength and weakness. Inviting a few experts to join you for some of your sessions can fill in the knowledge gaps.

## DETERMINING CONTENT OF STUDY

Pages 12-13 of the [CLM<sup>SM</sup> Information and Application Packet](#) detail the areas of knowledge covered on the exam and the emphasis on each area by percentage. At first glance this list may appear to be overwhelming, but it can systematically be broken down and organized into units suitable for study within your group.

It is important to keep in mind that earning the CLM<sup>SM</sup> designation requires an above average knowledge of the areas listed. Strive to cover each topic at a level that includes an understanding of the more complex skills, laws, and procedures crucial to effective law firm management.

A 10-item sample test is [online](#) for use by chapter study groups. Reviewing the sample test will be helpful in determining the content and difficulty level of typical CLM<sup>SM</sup> exam items. This test may be distributed to individual participants or completed as a group. The results of this test will show participants which areas may require further study. This supports the need to begin the study group early enough to allow for further review of specific areas.

### **Purpose of the Sample Test**

The purpose of the [sample test](#) is to give candidates an opportunity to become familiar with the structure and content of the CLM examination. The items are presented in the same format and in random order, as they are on the full-length version. While your score on this sample test *will not predict* exactly how you will perform on the full-length examination, taking the practice test will familiarize you with the test. In addition, your score will allow you to get a sense of your strengths and weaknesses in the content categories shown above, which should help you to focus your study efforts.

### **How to Use the Sample Test**

Use your score to gauge where you may need further study to prepare for the actual CLM examination. Request the guidance of a CLM<sup>SM</sup> from your chapter or region in determining specific topics to be covered and at what level. [A list of Certified Legal Managers](#), their firm and location (as of 12/2014) is [online](#). Contact other ALA chapters that have conducted study groups for what they found to be most successful. Make it clear to participants that topics and materials covered in the study group are aids to studying for the exam and not necessarily exactly what will appear as test items on the exam.

You may find that it has been many years since some of your study group members have “studied” or taken a multiple-choice exam of this difficulty level. You may want to consider including a session on study techniques and on tips for taking exams. Community colleges and universities are excellent resources for instructors in these areas.

If you have any questions or need assistance in completing the CLM application, please feel free to contact the Certification Center at [certification@alanet.org](mailto:certification@alanet.org)

## PRESENTERS AND SPEAKERS

The size of your group, geographic location, and budget will factor into if and how you secure presenters for study group sessions. Resourcefulness is the key to success in this area. Seeking suggestions from as many people as possible of names of presenters and subject matter experts will ensure your group selects the most suitable and competent presenter. Always strive to find an expert in the field, known to be knowledgeable and an effective teacher. Some suggested resources:

- Study group, chapter, or ALA members who are recognized as experienced legal administrators with expert-level knowledge
- Professionals from within member firms who have a specialized area of expertise (Attorneys, CPAs, HR specialist, Facility Operations Managers, Office Systems Managers, etc.) ALA's Peer Consulting Network located in the Membership Directory may be helpful in locating an expert within your chapter or one close by.
- University and community college professors
- Vendors/Consultants
- Professional Trainers
- Members of other professional associations
  - Association for Information Management Professionals ([www.arma.org](http://www.arma.org)) for records management
  - International Facility Management Association ([www.ifma.org](http://www.ifma.org))
  - Society for Human Resource Management ([www.shrm.org](http://www.shrm.org))

## WORKING WITH PRESENTERS

Explain in detail the purpose of the study group. Provide them with the [CLM<sup>SM</sup> Information and Application Packet](#) highlighting their content portions and suggest that they review other areas for a general understanding of what will be covered on the exam. Call their attention to the sample questions in the packet or [online](#). Make it clear that a presentation of "college-level" material be presented as it relates to law firm management.

Ask "up front" if they will require an honorarium. Most CLM<sup>SM</sup> study groups have reported having to pay very few honorariums. Check with your chapter leadership regarding any policies that may be in place with regard to paying presenters.

Ensure they know their audience -- make sure you do as well. A simple survey completed with the attendee registration will tell you their functional area of expertise, how long they have been a legal administrator, past education and how many attorneys are in their firm.

Make sure presenters know quality handouts are expected. Know in advance if they are bringing enough for the group or if you are expecting to duplicate them. Insist that all slides and pages be numbered. If you are to make copies, establish a date to receive them, so all of this is done before the session. Request that they prepare presentation materials that will serve two purposes:

- An outline or PowerPoint presentation that will allow for efficient note-taking during the presentation
- Additional materials that will serve as resources for study following the presentation (vocabulary lists, specific laws, relevant articles they have written, URLs of related web sites, books, etc.)

You may also want to consider requesting the presenter prepare a short quiz to be completed by participants at the end of the session if time allows, or to be taken home to complete prior to the next session. Be sure an answer key is provided as well.

Visual aids play an important part in the learning experience and today's audience expects high-quality visuals. It is suggested that the study group provide a minimum of a flip chart with markers. Presenters may offer to bring their laptop and LCD projector to further enhance their electronic presentation. If this is the case, the study group may need to supply a screen on which to project the images.

Ask if the presenter is willing to take additional questions related to their presentation by phone or e-mail following their presentation.

Send all speakers a confirmation letter. You may even want to have them sign it and send it back to you as an acknowledgment of their commitment.

**NOTE: If your study group is small, less structured, or informal, individuals from within the study group will likely be the primary presenters. The Content Outline of the Body of Knowledge can be broken down into subject areas and assigned to individuals to prepare a presentation and provide suitable handouts and study materials for the group. In the case of a subject area that no individual feels they have the expertise to present, it would become their responsibility to secure a member of their firm, a vendor, another chapter member, etc. to present to the group.**

**With each presentation, it is important to remind study group members that materials presented are not expected to be the only source for studying for the exam.**

## LOGISTICS

Meeting Space - This will vary depending on the geography and size of your group. You may find that one member's firm will be willing to donate meeting room space for all meetings or you may find that rotating between several firms will be required or preferable. Other suggested meeting areas might be public library conference rooms, community colleges, park district meeting rooms, subdivision club houses and local restaurants and hotel meeting rooms.

Meeting time – The most commonly chosen meeting time by study groups interviewed has been a 3-hour period in the evening. The day of the week chosen typically remained consistent throughout the period the groups met. Some groups met weekly, some every other week, some monthly. Other groups have met for 2-hour sessions during lunch or for early morning breakfast sessions. Choose a meeting time that will accommodate your intended presenters as well as participants. Other successful meeting arrangements have included day-long sessions conducted on weekends, and at monthly chapter meetings conducted over the course of the year.

Length of study – Surveys of previous CLM<sup>SM</sup> study groups indicate that on average, they have planned for approximately 30 – 40 hours of presentation time. Many have included follow-up group Q&A sessions for a week(s) following the presentations and prior to the exam. When planning your study group, allow enough time prior to an exam for participants to digest material, supplement any weak areas and spend time reviewing and studying materials presented during study group sessions.

Room Set-up – Include tables in the set-up whenever possible. This allows participants to easily take notes, accommodates food and beverages, and reduces fatigue especially if the sessions are being held outside of normal working hours. It is recommended that at minimum, a flip chart be available for formal presentations.

Refreshments – Your group's meeting time and location will be the key factors in determining what will be required. Water, soda, and coffee should be available in the room or available for purchase close by. Some study groups that have met in the evenings have included a simple dinner (pizza, subs, salads) in the cost of registration. Groups that have met during the lunch hour have effectively used the brown bag technique and provided only beverages. Early morning meetings may include a simple continental breakfast or just coffee. Attempt to provide what will make the attendees comfortable without creating additional expense and effort for the committee.

Handout Materials – Speaker materials should be numbered and duplicated for each participant. Providing 3-ring binders for materials is helpful for participants in keeping their materials organized. Retaining a master file of all handout materials is recommended.

The group may also want to consider putting a procedure in place to ensure that those who miss a session receive the handout immediately following the session. Encouraging presenters to provide their handouts electronically is also beneficial. If handout materials are available electronically prior to the session and sent to all participants, duplication

costs can be greatly reduced by having each participant print their own set and bring them to the session.

Miscellaneous – In chapters where participants are separated by longer distances, consider allowing participants who are unable to make the drive, to listen by speaker phone, or use Skype, FaceTime or Google Hangouts. Recording the presenter - with the presenter's permission - is also recommended to allow participants the opportunity to listen to sessions they miss or to review materials they did not understand.

## **DETERMINING A BUDGET**

Below are some items to consider when planning a CLM<sup>SM</sup> study group and determining if a fee is necessary.

Speaker/Presenter Fees – You may want to consult with your chapter leadership regarding policies the chapter has put in place for who they recommend paying and standard honorariums. In most cases, an honorarium may not be required, but the study group may choose to pay expenses or provide a small gift.

Speaker/presenter handouts and additional resources are a must for any educational program. If you are providing an honorarium for the speaker, you may want to request they bring their handout materials in the required quantity. However, it is more likely that the study group will be responsible for duplicating materials. You may want to obtain a sponsor to cover significant duplication costs or seek the assistance of participating member firms to share in the expense. Or use Dropbox to share handouts.

Building a resource library of recommended study materials is advantageous. Pages 15 & 16 of the [CLM<sup>SM</sup> Information and Application Packet](#) provide a listing of potential resources. This is a list of suggested reading. Every publication in every category is not required. Check with member firms to determine if a resource can be borrowed for the length of the study group. If recommended resources are unavailable through member firms, some materials are available for purchase through the ALA Book Store, [www.Amazon.com](http://www.Amazon.com), [www.bn.com](http://www.bn.com), [www.abanet.org](http://www.abanet.org) or [www.lawjournalpress.com](http://www.lawjournalpress.com). Other books and articles covering similar content may also be used.

Refreshments are considered a courtesy, and group members will certainly learn more if their minds are not wandering due to thirst or hunger. Snacks may ensure attention at the end of an already long day. If individual firms are hosting the study group meetings, they may be willing to donate beverages.

Meeting room costs – if your group will be meeting in space other than in member firms, you may need to budget for these charges.

Postage – Budget for general announcement mailings, correspondence with speakers, postage to mail handout materials to group members who miss a meeting, etc.

## **FORMAL ANNOUNCEMENT AND REGISTRATION FORMS**

Once the curriculum has been determined, presenters contracted, logistical arrangements made, and a budget has been prepared, construct the formal announcement and registration form that will be provided to all chapter members. You may decide to make this a separate mailing or include it as part of your chapter newsletter. In either case, it is recommended that you include the following information:

- The purpose of the study group
- Dates, times, and meeting locations of all sessions
- Registration fee
- Brief outline of content to be covered at each session
- Name of person to contact with questions

Obtain the following information from those registering for the study group (useful information for group as well as presenters)

- Name, firm name and address, home and work phone numbers, e-mail address
- Overall size of firm, number of attorneys and staff they are responsible for
- Number of years in the legal profession
- Number of years as an administrator
- Special areas of expertise

In addition to the formal announcement, use every opportunity to plant the seeds for forming a study group by enthusiastically discussing the plans with other chapter members.

### **GOOD LUCK**

The success of your study group lies in planning and in participation, and like most things in life, you get out of it what you put into it. Your efforts in forming a study group will be both challenging and rewarding. Hopefully the steps outlined in this guide will aid you in this process. You will be contributing to your professional development as well as to that of your peers, and perhaps motivating others to become more involved in chapter activities.

After your study group has completed its meeting schedule and has had an opportunity to reflect, please take the time to share your experience by completing the form at the end of this guide.

If you have questions or need assistance, please contact [certification@alanet.org](mailto:certification@alanet.org)

## CLM<sup>SM</sup> STUDY GROUPS

A list of current CLM study groups can be found [online](http://www.alanet.org/clm/studygroups.aspx) at <http://www.alanet.org/clm/studygroups.aspx>

## List of Certified Legal Managers (CLM)<sup>SM</sup>

A list of current CLMs can be found [online](http://www.alanet.org/clm/studygroups.aspx) at <http://www.alanet.org/clm/studygroups.aspx>

## CLM<sup>SM</sup> Examination Blueprint

		<i>Proportion of 100-item Exam</i>
<b>I.</b>	<b>Financial Management</b>	<b>31%</b>
	A. General Accounting	14%
	B. Financial Information and Analysis	17%
<b>II.</b>	<b>Human Resources Management</b>	<b>33%</b>
	A. Employee Selection and Promotion	9%
	B. Performance Management and Compensation	19%
	D. Organizational Development	5%
<b>III.</b>	<b>Legal Industry/Business Management</b>	<b>19%</b>
	A. Legal Industry	11%
	B. Business Management	8%
<b>IV.</b>	<b>Operations Management</b>	<b>17%</b>
	A. Technology/Automation Management	5%
	B. Operations	12%

## Share Your CLM<sup>SM</sup> Study Group Experience

It is our goal to continue to build this Guide based on information provided by CLM<sup>SM</sup> study groups that have planned and met and in the past. Please answer the following questions and return this form to ALA Headquarters.

1. Name of Chapter
1. We began planning for our study group                      prior to the first meeting.
3. Our study group met:  
 weekly     every other week     monthly                      other
4. Time sessions were held
5. Number of participants
6. Location of meetings
7. Registration fee
8. Source of presenters/instructors (participants, experts, vendors, etc.)
9. Honorariums paid
10. How was interested generated to form the study group?
11. Successes:
12. Pitfalls:
13. Perceived benefits to individuals

14. Perceived benefits to the chapter:

15. Advice you'd like to pass along:

Other Comments:

#### Contact Information

Name:

Address:

Phone:

e-mail:

Please enclose samples of forms, notices, outlines, schedules, evaluations, etc. that you are willing to share. Do not send copies of session handouts.

Email to:

[Certification@alanet.org](mailto:Certification@alanet.org)

OR

Mail to:

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Attn: Certification

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