

# CLM<sup>SM</sup>

Certified Legal Manager

## ***Exam Preparation - Some Potential Resources***

The following reading materials are **representative of the types of materials** that have been used as sources for writing test items. **It is important to understand that no single resource is adequate for preparing for the exam.** In preparing for the CLM exam, other books and articles with similar subject matter may be used instead. **One should seek the most current edition or most recent year of any resource utilized.** Exam questions may cover any of the areas on the [Content Outline of the Body of Knowledge](#).

**NOTE: These are suggested resources only. One does not need to study all the resources listed.**

## ***General Resources***

- *Law Practice* (magazine). ABA Law Practice Division ([www.americanbar.org](http://www.americanbar.org)).
- *Legal Management* (magazine). Association of Legal Administrators (ALA) ([www.alanet.org](http://www.alanet.org)).

## ***Financial Management***

Any introductory college level accounting textbooks, plus industry-specific resources such as:

- ABA Standing Committee on Ethics and Professional Responsibility (Billing for Professional Fees, Disbursements and Other Expenses). American Bar Association.
- Accounting and Financial Planning for Law Firms (newsletters). Law Journal Newsletters, a Division of ALM Media.
- *Annotated Model Rules of Professional Conduct, 7<sup>th</sup> Edition*. ABA Publishing. Also available free online.
- Cotterman, J. *Compensation Plans for Law Firms, 5<sup>th</sup> Edition*. ABA Publishing: Law Practice Division.
- Iezzi, John B. *Results-Oriented Financial Management: A Step-by-Step Guide to Law Firm Profitability, 2<sup>nd</sup> Edition*. ABA Publishing: Law Practice Division.
- Quinn, J. P., Bailey, J. A., Gaulin, D. E. & Kolodziejczak, S. *Law Firm Accounting and Financial Management* (including current annual supplement). Law Journal Press.
- Robertson, M. *Alternative Fees for Business Lawyers and Their Clients*. ABA Publishing: Law Practice Division.

General tax resources such *Circular E, Employer's Tax Guide*, Publication No. 15. U.S. Internal Revenue Service.

## ***Human Resources***

General textbooks such as:

- Brown, D. R. *An Experiential Approach to Organizational Development, 8th Edition*.

Pearson Prentice Hall.

- Fisher, R., & Ury, W. *Getting to Yes: Negotiating Agreement Without Giving In*. Penguin Books.
- Mathis, R. L., & Jackson, J. H. *Human Resource Management, 14<sup>th</sup> Edition*. Cengage Learning.

Reference materials on current federal laws and government publications such as:

- I-9, Employment Eligibility Verification. U.S. Form 1-9, OMB No. 1115-0136. U.S. Citizenship and Immigration Services.
- *Americans With Disabilities Act (ADA)*. U.S. Department of Labor.
- *Consolidated Omnibus Budget Reconciliation Act (COBRA)*. U.S. Department of Labor.
- *Employee Retirement Income Security Act (ERISA)*. U.S. Department of Labor.
- *Fair Labor Standards Act (FLSA)*. U.S. Department of Labor.
- *Family and Medical Leave Act (FMLA)*. U.S. Department of Labor.
- *Health Information Technology for Economic and Clinical Health Act (HITECH)*. U.S. Department of Health & Human Services.
- *Health Insurance Portability and Accountability Act (HIPAA)*. U.S. Department of Health & Human Services.
- *Patient Protection and Affordable Care Act (PPACA)*. U.S. Department of Labor.
- *Title VII of the Civil Rights Act*. U.S. Equal Employment Opportunity Commission.
- *Uniformed Services Employment & Reemployment Rights Act (USERRA)*. U.S. Department of Labor.

Websites containing information on the above, along with related information include:

- U.S. Citizenship and Immigration Services ([www.uscis.gov](http://www.uscis.gov))
- U.S. Department of Health & Human Services ([www.hhs.gov](http://www.hhs.gov))
- U.S. Department of Justice ([www.justice.gov](http://www.justice.gov))
- U.S. Department of Labor ([www.dol.gov](http://www.dol.gov))
- U.S. Equal Employment Opportunity Commission ([www.eeoc.gov](http://www.eeoc.gov))

### ***Legal Industry/Business Management***

General textbooks such as:

- Maister, D. H. *Managing the Professional Service Firm*. Free Press.
- Maister, D. H. *True Professionalism*. Free Press.
- Robbins, S. P., De Cenzo, D. A., & Coulter, M. *Fundamentals of Management: Essential Concepts and Applications, 8th Edition*. Prentice Hall.

Industry specific resources, such as:

- *Annotated Model Rules of Professional Conduct, 7<sup>th</sup> Edition*. ABA Publishing. Also available free online.
- Chiaiese, Beth. *Ethical and Legal Foundations of Law Firm Records Management and Information Governance*. ARMA International.
- Consultants at Altman Weil. *How to Manage Your Law Office*. Matthew Bender & Company, Inc.
- Cunningham, G. C., & Montana, J. *The Lawyer's Guide to Records Management and Retention*. ABA Publishing: Law Practice Division.

- Davis, A.E. *Risk Management: Survival Tools for Law Firms, 2<sup>nd</sup> Edition*. American Bar Association.
- Grella, T. C., & Hudkins, M. L. *The Lawyer's Guide to Strategic Planning: Defining, Setting, and Achieving Your Firm's Goals*. ABA Publishing: Law Practice Division.
- *Uniform Task-Based Management System: Litigation Code Set, Background, Definitions, Principles and Assumptions*. American Bar Association.

### ***Operations Management***

- *Law Technology News* (magazine).
- *General Conditions of the Contract for Construction, AIA Document A201*. American Institute of Architects.
- *Office Buildings: Standard Methods of Measurement (ANSI/BOMA Z65.1—2010)*. BOMA International.
- Rhodes, J. & Polley, V. *The ABA Cybersecurity Handbook: A Resource for Attorneys, Law Firms and Business Professionals*. American Bar Association.
- Williams, M. *The Principles of Project Management*. SitePoint.

Websites containing information on the above, along with related information include:

- American Bar Association ([www.americanbar.org](http://www.americanbar.org)).
- American Institute of Architects ([www.aia.org](http://www.aia.org)).
- ARMA International ([www.arma.org](http://www.arma.org)).
- Building Owners and Managers Association International (BOMA International) ([www.boma.org](http://www.boma.org)).
- International Legal Technology Association (ILTA) ([www.iltanet.org](http://www.iltanet.org)).
- Project Management Institute (PMI) ([www.pmi.org](http://www.pmi.org)).
- Web-based resources related to computer technology.