

LEGAL MANAGEMENT

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ONBOARDING: 10 TIPS FOR SUCCESSFULLY INTEGRATING LATERALS INTO YOUR LAW FIRM

Lateral hiring is an important aspect of the hiring market — and an investment. We've got tips for best practices for onboarding as well as tips for lateral partner integration.

Can't-Miss Lead Generation and Conversion Strategies

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LEGAL MANAGEMENT STAFF

PUBLISHER

Oliver Yandle
oyandle@alanet.org

EDITOR-IN-CHIEF

Theresa Wojtalewicz
twojtalewicz@alanet.org

MANAGING EDITOR

Valerie A. Danner
vdanner@alanet.org

COPYWRITER/EDITOR

Kristina Vragovic
kvragovic@alanet.org

ADVERTISING OPPORTUNITIES

Robert Leighton
advertising@alanet.org

ART DIRECTOR

Jeff Wojciechowski
Straight North, LLC

GRAPHIC DESIGNER

Abby Burkle
Straight North, LLC

Cristina Muzzio
Straight North, LLC

WEB TEAM

Eric Michalsen
Straight North, LLC

Greg Wixted
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OLIVER YANDLE, JD, CAE
*Executive Director, Association
of Legal Administrators*

“

How can law firm leaders be a catalyst for more engagement and cooperation with corporate legal operations professionals?”

Be a Catalyst for Change

For those of you who were unable to attend the Annual Conference & Expo in Denver last month, you missed a terrific week of outstanding education, engaging networking and lots of fun! Many thanks to the Conference Committee, business partners, attendees and staff for all they did to make the event such a success.

During the conference, I was fortunate enough to serve as the moderator of a lively panel of corporate legal operations leaders who shared their insights and perspectives on trends and challenges in legal services procurement. The discussion began with a review of a letter one of the panelists, NetApp's Chief of Staff and Director of Legal Operations Connie Brenton, received from one of their top law firms. The one paragraph letter, dated January 31, 2017, read as follows:

Dear Client:

In order to comply with Rule 1.5(b)(1) of the Massachusetts Rules of Professional Conduct, which requires that we communicate in writing any changes in rate of our fees, we are notifying you that [the firm] increased its billing rates effective January 1, 2017. The increased rates will be reflected in future invoices. We thank you for the opportunity to provide you with professional services and value our continued relationship. Thank you.

Sincerely,

[Name]

Manager of Client Accounts

To executives at NetApp, the letter captured many of the frustrations corporate clients say they experience in dealing with outside counsel:

- The letter was dated January 31 and received several days later, but it announced rate increases that had already been implemented without any conversations with the client.

- It was addressed “Dear Client,” which suggested that perhaps the client wasn’t as valued as the letter indicated.
- The letter was signed by a law firm employee the client had never met or communicated with.

Law firm chief operating officers shared frustrations of their own, including challenges in responding to RFPs, compliance with varying billing guidelines, and the communication disconnects between the lawyers managing client relationships and the operations professionals responsible for the delivery of legal services. And everyone acknowledged there was plenty of room for improvement on both sides of the equation.

There was a fair amount of discussion about billing guidelines and security audits — two areas where the variety and complexity of the requirements make it difficult for law firms to efficiently comply and for clients to have legal services delivered in a manner consistent with their business needs.

As the group explored ideas for how to bridge the gap, standardization emerged as one opportunity for collaboration. ALA’s Uniform Process-Based Management System (UPBMS) can support initiatives to streamline processes, gain insight into the true costs of delivering legal services, and provide a common language that both law firms and clients can use in assessing the full range of support tasks in legal operations.

Likewise, ALA is working with the Legal Marketing Association and the International Legal Technology Association as part of Standards Advancement for the Legal Industry (SALI), a consortium developing legal matter coding standards to bring greater consistency and clarity to pricing, procurement and management of legal services.

But at the center of the discussion was the need for better communication and collaboration. How can law firm leaders be a catalyst for more engagement and cooperation with corporate legal operations professionals? How can we encourage our key client relationship managers to support and facilitate these conversations, allowing the folks responsible for making back-end operations work effectively to connect and find solutions to shared pain points? How do our law firm operations professionals lead change within the firm to adopt practices that improve legal service delivery? How do we help corporate clients in making the changes needed to improve the selection and evaluation of law firms?

As the legal industry continues to transform and client pressures continue to increase, perhaps we have reached a tipping point where the operations professionals on both sides of the relationship have a unique opportunity to work together to find solutions to these challenges. As the leaders in the business of law, ALA has the opportunity to be that catalyst.

We have taken some early steps in our work with UPBMS and SALI, but the next steps will require law firm leaders to convince the traditional owners of the client relationship to welcome their involvement in strengthening the client relationship. I look forward to exploring ways ALA can help facilitate that change. ■

 oyandle@alanet.org

 www.linkedin.com/in/oliver-yandle-8a98146



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Every Now and Then You Need a Salad

“Knowledge is knowing that a tomato is a fruit. Wisdom is knowing not to put it in a fruit salad.” – Miles Kington

“

Just because information can fit on a slide, doesn't mean that it should. Any slide requiring an apologetic 'I know you can't read this' detracts from the message and lowers engagement.”

The list of personal productivity tools most often used by lawyers likely includes technologies for email, calendar management, time reporting, web conferencing and document production. But what about the soft skills critical to demonstrating the value of effective technology use? After all, having the ability to develop a jaw-dropping PowerPoint presentation is lost without the finely tuned communication skills to deliver it.

Research shows the importance of pairing business competency with technical ability, and that both hard and soft skills are prevalent requirements for all job roles. In an article by international staffing firm Robert Half, David Jones states: “As our workplaces become more collaborative, employers need an employee who can not only perform the job well, but who also demonstrates sound communication, leadership and team-building qualities.”

Knowledge, understanding *and ability* are necessary to succeed. Like choosing a wine or salad to complement your meal, the perfect blend of soft skills with the necessary technical prowess can truly enhance your professional success.

To illustrate such perfect pairings, let's examine the four primary Microsoft applications — PowerPoint, Excel, Outlook and Word — and the *soft skills* that complement their use.

POWERPOINT: PRESENTATION SKILLS

The ability to create a slideshow is great. But if you don't have effective presentation skills, the audience may walk away with heartburn and a bad aftertaste. Engaging presenters leverage vocal tools (register, prosody, timbre, pace and volume) and physical tools (posture, eye

contact, gestures and movement) to capture their audience's attention. Likewise, good speakers pair presentation skills with effective visuals.

Just because information *can* fit on a slide, doesn't mean that it *should*. Any slide requiring an apologetic "I know you can't read this" detracts from the message and lowers engagement. In addition, the incorrect use of images and colors can have the same effect. Choosing the right design and image is not as simple as one might think. Research shows images can increase awareness of social differences, and colors have different meanings in diverse cultures. For example, red indicates warning in the United States, means celebration and luck in China, and symbolizes birth and fertility in India.

EXCEL: DATA ANALYSIS

The ability to digest and make sense of large volumes of data requires the right technical tools and the ability to decipher what the data is saying. Relying solely on technical expertise to display data in a chart layout is simply not good enough in the high-stakes legal industry. Don't allow the chart to dictate how data looks; let the data dictate how the chart should look. The technical skill is complemented with the soft skills of data analysis — validity, reliability, accuracy and precision — things Excel can't tell you about the data.

OUTLOOK: TIME MANAGEMENT

Lawyers live by their inboxes and calendars, and they likely face numerous unscheduled task assignments and interruptions daily. Pair the ability to schedule tasks and appointments and manage that unruly inbox with honing the skills of effective time management and prioritization methodologies. Leverage technology to keep abreast of upcoming deadlines and stay on track by using tasks and reminders. According to *The Design of Everyday Things*, interruptions are the No.1 cause of errors for highly skilled people. Instead of relying solely on memory, use the task manager to keep track of in-progress, high-priority, delegated and future tasks.

WORD: EFFECTIVE WRITING

On March 14, 2017, the U.S. Court of Appeals for the First Circuit decided *O'Connor et al v. Oakhurst Dairy et al.* based on a missing comma. Law360 reported that it was the "lack of a serial or Oxford comma ... that made the law ambiguous." Circuit Judge David Barron stated, "For want of a comma, we have this case." In addition to the soft skills of

proper punctuation and grammar, the technical skills of using styles and automatic numbering help create polished and professional-looking documents while increasing efficiency.



There is a saying that "you never get a second chance to make a good first impression." How you interact with others — whether delivering a presentation, disseminating data or collaborating on documents — is important because it's not only that first impression but also the last impression that matters. Sharpening both your hard skills and soft skills will keep you from putting a tomato in the fruit salad. ■

ABOUT THE AUTHORS

Cindy Mitchell is Product Development Manager at Traveling Coaches and has more than 20 years of experience in the design and development of technology solutions that deliver holistic and personalized learning experiences.

 cmitchell@travelingcoaches.com

Carolyn Humpherys is a Traveling Coaches Learning Development Consultant with 30-years' experience in the legal industry and specializes in instructional design, communications and graphic design. She is also a member of the Springboard Consulting team that created the Certified Legal Trainer Program and winner of ILTA's 2016 Distinguished Peer Award for Innovative Consultant of the Year.

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Cyber Readiness: What You Can Do to Beat the Bad Numbers

The numbers are not good — not at all. At ALA's recent Annual Conference & Expo in Denver, we used real-time polling technology in our sessions to get hard data on the attendees' cyber knowledge and preparedness to this emerging risk. Numbers don't lie; we have a lot of work to do to better protect our firms.

“

The only thing worse than having a loss without insurance is having a loss with an insufficient policy that misled your partners into a false sense of security.”

Here are three startling statistics:

1. Who's at Risk

When asked, **66 percent** of firms admitted that they were the victims of either a data breach or a phishing attack at their firm. The impact of these attacks varied by firm. Some simply suffered a basic nuisance attack, and others had their systems crippled and were threatened by hacking criminal elements.

2. Who Has Financial Protection

While some law firms may have some limited coverage in their professional liability, general liability or crime coverage, only **38 percent** have any meaningful cyber coverage that can be found in a stand-alone cyber liability insurance policy. This statistic resonates in our national client base as well. Despite warning law firms for nearly five years about this emerging and serious risk, a minority of law firms are buying this very inexpensive coverage.

3. Who Is Ready for the Inevitable

It is becoming more and more evident that all firms need to prepare for the day that they are the victim of a cyberattack, so we asked attendees how many firms have a cyber response plan to execute after such an event. **Only 20 percent** of the firms reported that they have a cyber response plan in place.

As prudent financial managers of our firms, we need to do a much better job. We need to be ready. Cyber and phishing risks are not going away, and if anything, they are becoming

a more serious risk in the future. So what can you do now in your firm?

Have a serious discussion at your next partners meeting about this. Your partners need to be more attuned to client demands in this area for risk management and insurance. If not, they risk seeming out-of-step to their clients' ongoing business environments. The partners need to understand that their firm, despite you and your amazing IT and security staffs, is vulnerable to attack and will likely eventually be a victim too.

Work with your broker to assess and insure this risk properly. An alarming number of firms (as demonstrated above) have no cyber coverage, and even worse, some law firms have purchased woefully insufficient coverage, with an endorsement to their professional liability policy or a bare-bones standalone cyber policy. The only thing worse than having a loss without insurance is having a loss with an insufficient policy that misled your partners into a false sense of security.

Prepare a cyber response plan. Much like a disaster recovery plan, your cyber response plan details what you would do when impacted by a cyber event. Common steps in a plan include calling your insurance broker (include all contact details in all steps, as you may not have access to your data when these plans are implemented), contacting your data

breach coach (this is the lawyer/firm that will advise through the process), and calling your forensic and IT consultants. Your plan should also detail the short- and long-term steps, like assessing any public relations needs, legal liabilities and regulatory actions. You can find a sample detailed plan in the session materials from my Annual Conference session, LI22: What You Need to Know Now about Cyber Liability Insurance. Feel free to email me for a copy. I've also covered steps on selecting cyber liability insurance in my July/August column.

The good news is that law firms have come a long way with education in general, but as the data shows, we have a lot more ahead of us to adequately prepare for today's cyber risk. The bad guys are increasing their efforts against law firms. By understanding these numbers, you can make sure that your firm isn't the next victim. ■

ABOUT THE AUTHOR

Uri Gutfreund is the National Law Firm Practice Leader for Risk Strategies Company, a national top 25 insurance broker. He and his multidisciplinary team advise law firms on all types of insurance and benefits. Gutfreund is a frequent speaker at legal conferences, and a writer and blogger on insurance and risk management.

 ugutfreund@risk-strategies.com

 www.linkedin.com/in/urigutfreund

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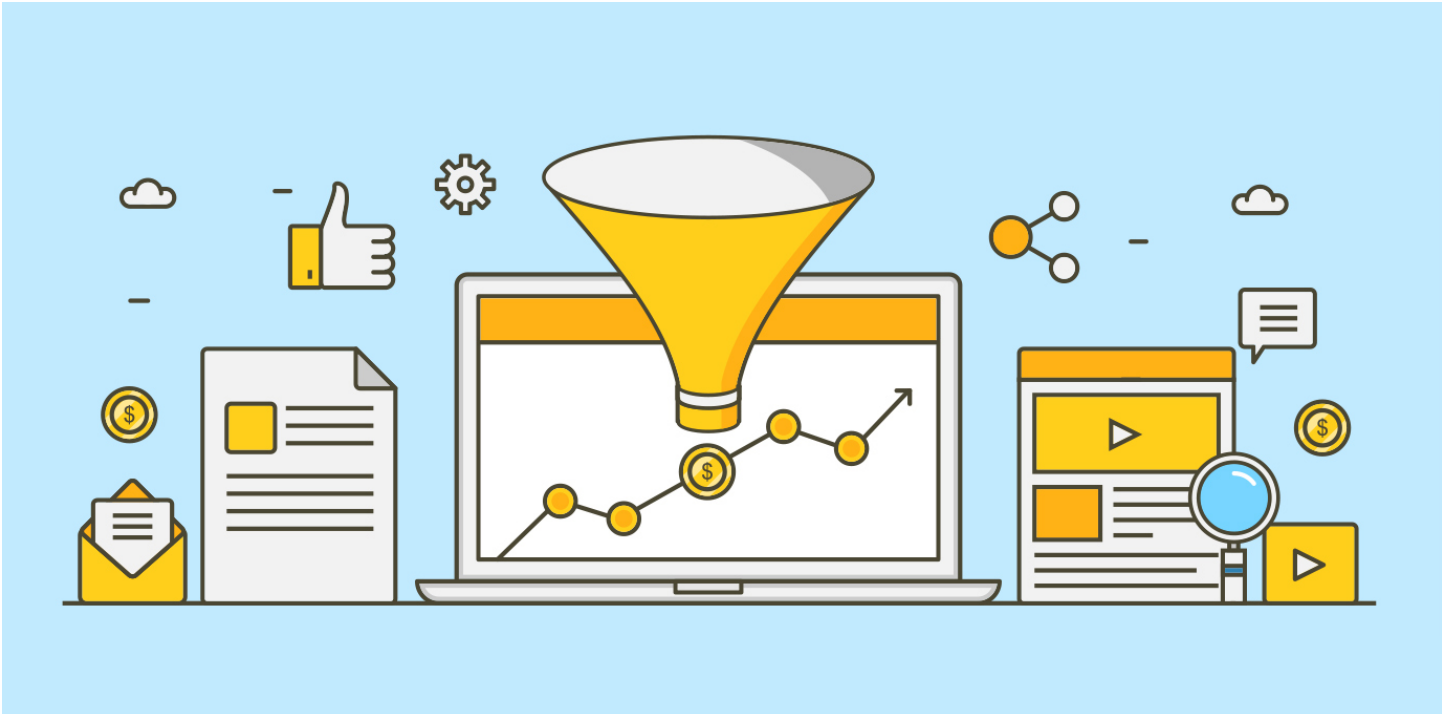
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Marco Maggio • mmaggio@allcovered.com
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Can't-Miss Lead Generation and Conversion Strategies

To locate and land new clients, you need a strong online presence, diverse contact list — and quick callbacks.



ERIN BRERETON
Owner, Chicago Journalist Media

In today's competitive market, finding potential clients isn't easy.

Convincing them you're the best choice can prove even more challenging. The average consumer attorney converts just 5 to 15 percent of every 100 leads into paying clients, according to Stephen Fairley, Chief Executive Officer (CEO) of legal marketing service The Rainmaker Institute.

"Many attorneys fall prey to the one-call-quote belief," Fairley says. "A prospective client calls, you talk to them for 5 to 25 minutes, pitch them, and the client signs up."

In reality, the process is often much longer and much more involved. To successfully convert promising leads into lucrative new business, firms need to have a solid marketing plan — and a thorough follow-up process in place.

In a recent study from the Legal Marketing Association and Bloomberg Law, 67 percent of firms said they were increasing their focus on business development and marketing. Internal pressure to generate revenue was the biggest reason.

GENERATING LEADS

In a recent study from the Legal Marketing Association and Bloomberg Law, 67 percent of firms said they were increasing their focus on business development and marketing. Internal pressure to generate revenue was the biggest reason.

To build business and profitability, firms may want to try ramping up efforts in the following areas:

Online marketing: The majority of consumers — 76 percent — who needed an attorney looked for one online, according to a Lexis-Nexis Martindale-Hubbell study.

The way a firm communicates with the leads its marketing and referral efforts generate can either earn it new business or end the relationship before it starts.

Driving traffic to the firm's website should be an obvious goal; however, because search engine algorithms change frequently, staying on top of search engine optimization (SEO) trends can be tricky, according to Fairley. He recommends hiring a professional with a proven legal industry track record.

In the past three to five years, he says, firms have also begun to see value in having more robust practice area-centric content.

"If you have two competitors in the same city, one has a 10-page website and the other has a 200-page site, Google will rank the 200-page site higher in its search results," Fairley says. "We have clients now who have several thousand pages of content on their website."

Offering more interactive content — a checklist, for example, compared to an article — and design that inspires users to take action can also help increase lead generation, according to Rita Chaires, Director of Web and Online Services at a membership-based practice management organization called the American Academy of Estate Planning Attorneys.

"If your site is static or a boring online brochure, it's not going to move anybody to pick up the phone and reach out," Chaires says. "Certain design elements should be tested. Does an orange button produce more clicks than a green button? Does a 'download now' option produce more clicks than a 'submit' one?"

Some industry members, according to Fairley, are using innovative tools like professionally produced videos to attract clients.

"There are a lot of misconceptions about what attorneys do, and consumers are more cynical and skeptical than before," he says. "If you've created a video about who you are, what you're like to work with, what results you've gotten for clients and why someone should hire your firm, that stands out from the competition."

Referrals: Roughly 40 percent of attorneys say referrals are responsible for more than 40 percent of their new business, according to a Super Lawyers survey.

In the current competitive market, however, firms can't depend solely on them to generate leads, according to Stevan Pardo, Chair of the construction, hotel and litigation groups at boutique Miami law firm Pardo Jackson Gainsburg, PL.



Roughly 40 percent of attorneys say referrals are responsible for more than 40 percent of their new business ... In the current competitive market, however, firms can't depend solely on them to generate leads.

"Selling who you are to other lawyers in the community isn't as effective as it used to be," Pardo says. "You have to go to the business client directly and supplement what you do through a lawyer referral network."

Pardo Jackson encourages its attorneys to get involved in community groups, business organizations like the Chamber of Commerce, and not-for-profits to expand their contact base.

Jonathan Fitzgarrald, Managing Partner at Equinox Strategy Partners, a legal business and development consultancy, recommends partnering with complimentary service providers — accountants, insurance brokers, business managers — who may view recommending your services as offering clients added value.



"There are other professionals outside of legal who are essentially targeting the same market," Fitzgarrald says. "The more you can form an alliance with them, the more likely they are to think of you when one of their relationships needs a lawyer."

To help attorneys network and meet new referral sources, some savvy firms are starting to provide client development training earlier than in the past, according to Fitzgarrald.

"Most law firms don't have their attorneys focus on any client generation until the attorney becomes a partner — then they've wasted 10 years of mentoring and developing future partners," he says. "Yes, it's expensive for law firms, but it's an investment that can pay off beautifully in the future."

SIGNING NEW CLIENTS THROUGH IN-PERSON INTERACTIONS

The way a firm communicates with the leads its marketing and referral efforts generate can either earn it new business or end the relationship before it starts.

"Whenever somebody fills out a 'contact us' form or completes another action on your website, it's very important someone within the firm is responsible for making sure each lead gets put into a marketing database, and there's a very specific follow-up sequence that's tracked," Chaires says. "If somebody downloads a probate checklist and is interested in learning more, are there additional resources you should be emailing them? That's someone looking for help."

It's equally as important to respond to other correspondence quickly. A study from sales management software provider Velocify showed returning a call within a minute increases the likelihood of conversion by nearly 400 percent. Starting in the second minute, that number drops to 160 percent — and keeps declining.

Yet 42 percent of law firms take three or more days to reply to voicemails or web-generated inquiries from prospective clients, according to an ABA Law Practice Division study.

"With the level of competition, you need to follow up persistently with multiple phone calls and emails — 6 to 10 times before giving up," Fairley says.

Instead of assigning the task to a busy attorney or paralegal, he recommends appointing an office manager or other non-attorney team member, or adding a new role.

“Once you’re getting more than 30 to 50 leads per month coming into the top of that sales funnel, you need to hire a dedicated client intake specialist,” Fairley says. “You can get 5 to 10 times the return on your investment.”

Once you’ve made contact, a few other moves may help you woo potential clients:

Meeting face-to-face: “You will always have a higher conversion ratio if you can get a lead to come in,” Fairley says. “People are more committed if they get in a car or on a bus or train to come into your office. There are less distractions, and you can build a rapport easier than on the phone.”

Being sympathetic to the situation: “Clients want to feel like their issue is the most important issue,” says Linda Worton Jackson, Chair of Pardo Jackson’s bankruptcy/restructuring and corporate transaction groups. “Even though you’ll need a lot of information to get to a solution, they need to know you’re already thinking about it.”

Considering alternative fee arrangements: That’s helped Pardo Jackson bring in new clients, according to Jackson. “Clients have to budget for legal services, and they expect us to budget, too,” Pardo says. “If we can’t tell them approximately what we think it will cost on a retainer, with some flexibility for adjustments, they’re not going to feel like we’re as nimble in our ability to satisfy their goals and needs.”

If you can’t convince the prospective client you can offer an agreeable arrangement, another firm might.

The legal market is highly competitive, and that isn’t likely to change anytime soon. However, with a carefully crafted value proposition and an ongoing commitment to expeditious communication, opportunities to convert potential parties into signed business can abound.

“Turning relationships into clients is not rocket science,” Fitzgarrald says. “If the timing is right and the message is right, there are tons of people out there.” ■



ABOUT THE AUTHOR

Erin Brereton is a legal industry marketing consultant and freelance journalist who has written about the legal industry, finance, business and other topics for more than 50 legal associations, magazines, websites and other publications.

 breretonerin@gmail.com

 twitter.com/erbrer09

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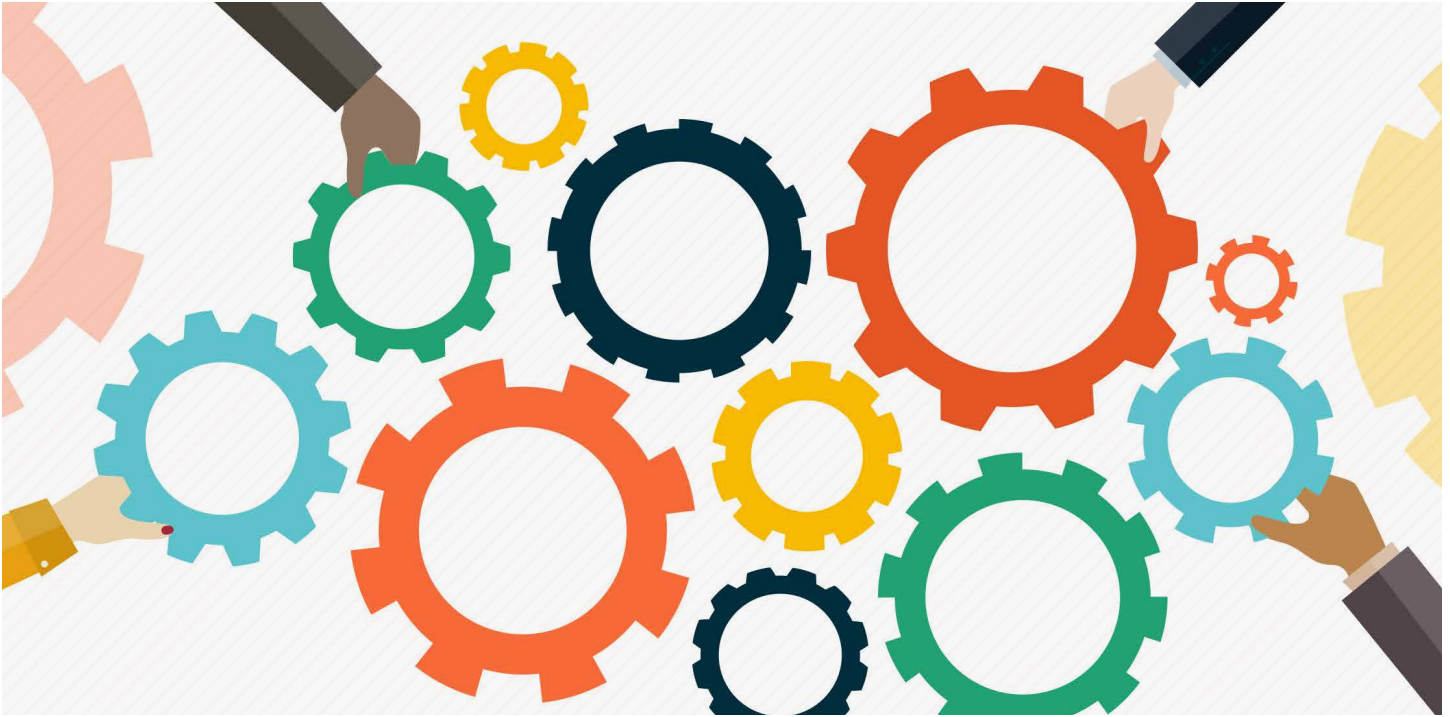
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Onboarding: 10 Tips for Successfully Integrating Laterals Into Your Law Firm

Lateral hiring is an important aspect of the hiring market — and an investment. We've got tips for best practices for onboarding as well as tips for lateral partner integration.



MARY KATE SHERIDAN
Writer, Editor and Attorney

Navigating a new law firm without guidance can be daunting. Firms make significant investments in lateral hires, but they do not always follow through with organized integration plans.

"Laterals are sometimes a firm asset that is not really well thought out," says Executive Coach Debra Forman of Pinstripe Coaching. "I find that sometimes people don't do a strategic plan. There really should be a strategy when it comes to lateral onboarding."

In fact, Altman Weil's 2016 Law Firms in Transition found that one-third of respondents have a moderate to high level of concern about their firm's preparedness to deal with acquisition and integration of laterals. Yet nearly three-fourths of respondents to the same survey believe increased lateral movement will be a permanent trend going forward.

Indeed, the 2016 Client Advisory released by Citi Private Bank and Hildebrandt Consulting found that "[l]aw firms are aggressively pursuing laterals in targeted geographic or practice areas, either to fill gaps or provide deeper bench strength."

Given that lateral hiring is such an important aspect of today's legal hiring market, firms cannot risk being unprepared.

Given that lateral hiring is such an important aspect of today's legal hiring market, firms cannot risk being unprepared. This article offers best practices for lateral onboarding, as well as tips specific to lateral partner integration.

GENERAL TIPS FOR ONBOARDING LATERAL ATTORNEYS

An effective lateral integration strategy should begin early in the interview process and focus on building personal relationships and providing necessary training and resources. Below are best practices for tackling lateral onboarding of new associates and partners.

Get Personal: One of the most important aspects of onboarding is forging connections with the lateral attorney during the interview process and continuing these connections once the attorney begins at the firm.

According to the National Association for Law Placement's (NALP) *Lateral Hiring Best Practices Guide*, "The firm's commitment to the lateral should be continuously conveyed through personal communications, attention to timing issues, and follow-up."

For example, Jenner & Block tries to build a bridge for its lateral hires through firm connections. Lateral partners connect with numerous people, including current partners, office administrators and recruiting professionals. Likewise, lateral associates meet with a firm associate and a lateral orientation coordinator throughout the process.

Smaller law firms have the advantage of allowing everyone at the firm to meet a potential lateral, which can provide useful insight into whether the person will mesh with the culture.

"Like any other transition, moving to a new firm can be quite traumatic, especially for those who have been at their firms for a long time," says Charlotte Wager, Chief Talent Officer at Jenner & Block. "A lot of partners have been at their firms since they were summer associates, and with a move you're

essentially uprooting somebody. We assign somebody to work side-by-side with that candidate every step of the way. Candidates have expressed to us that this has made a difference in which firm they ultimately chose."

These connections should continue past the hiring process and early start days, says David Freeman, the Chief Executive Officer of David Freeman Consulting Group and Founder of Law Firm CultureShift.

"Have some sort of a process in place that reminds the leaders to do some checking in," says Freeman, who notes that laterals can easily feel forgotten once the wooing process is over. "It's a huge investment, and you want it to work."

Jenner & Block, for instance, offers a one-year transition program for lateral partners during which they engage in scheduled meetings with various partners and administrators. This structured process "creates multiple opportunities for laterals to ask questions all while creating buy-in throughout all levels of the firm," says Alexis Reed, Director of Lateral Partner Recruiting at the firm.

Host an Orientation: Firms should not assume that because attorneys are experienced, they don't need an introduction to the firm.

"There should always be some form of orientation, and that orientation should be broken down to understanding how the firm works, how billing works and how the practice area works," says Forman. "Every firm is going to be different, and you don't want someone assuming that what they learned somewhere else is easily transferable."

When it comes to lateral partners, however, firms also must be sensitive to their timing needs. Rather than blocking out a new partner's first few days with orientation, firms may consider scheduling the orientation over a week, giving the partner time to be in touch with clients and peers and to address their matters, says Reed.

Be Prepared: Firms should consider what tools attorneys will need to begin working and make sure they provide those resources from the start.

Given how big of an investment firms make in their partners and the benefits firms realize when partners succeed, it is particularly important that firms focus on lateral partner integration.

From day one, firms should ensure that all technological equipment and access to office supplies are available. Firms also should provide new lawyers with office locations and their phone numbers, as well as introduce them to their assistants and their practice group when they start, according to NALP's *Hiring Best Practices Guide*.

Also critical is setting up the laterals' email accounts, says Susan K. Sawyer, Legal Administrator at Tucker, Saltzman, Dyer & O'Connell, LLP, who advises having these accounts ready in advance of day one so attorneys can transition their communications and get their clients accustomed to the new email address right away.

Personal relationships are clearly an important aspect of successful onboarding, and a formal mentor provides an instant connection for questions and a liaison for meeting others.

Further, firms should provide laterals with information on the firm's billing and financial practices when they start, says Forman. "They want to be sure they can do a seamless transition and don't want there to be lag time," she says.

Include Current Attorneys: Crucial to lateral success are the attorneys who already work at the firm, with whom laterals will build connections, collaborate and work.

"It is such a fine balance," says Forman, who likens lateral hiring to the new toy analogy. "The laterals are like the new shiny toy that's coming in, but firms want to make sure that they don't throw away the old toys. There has to be a fine balance of paying attention to the old toys, too."

Forman advises firms to involve current attorneys in lateral hiring, giving them influence into who should be hired and accepting input into whether potential laterals fit the culture. And once laterals start, current attorneys should be involved in welcoming them to the firm.

Smaller law firms have the advantage of allowing everyone at the firm to meet a potential lateral, which can provide useful insight into whether the person will mesh with the culture.

"Usually when we're bringing in new attorneys or a partner, everybody has a chance to meet each other before final decisions are made," says Sawyer, who indicates that they follow the same process with staff hires. "The idea is they've made an investment in this person and that they will want to see them succeed."

Assign Mentors: Personal relationships are clearly an important aspect of successful onboarding, and a formal mentor provides an instant connection for questions and a liaison for meeting others.

For lateral associates, firms may take a cue from Jenner & Block and assign a former lateral as a mentor. "It is important for our firm to consider how the lateral is experiencing this transition," says Wager.

It may be more difficult to find partners with time to mentor lateral partners. Freeman suggests targeting those partners "who interviewed and fought for having this lateral come on board because they already have an interest in that person."

ADVICE FOR ONBOARDING LATERAL PARTNERS

In his November 2016 *Legal Management* column, "What's Hot and What's Not in the Legal Profession," Robert Denney notes that "[l]ateral hiring continues to be hot. While there are other reasons, the principal one is to increase revenues and, hopefully, profits. However, some statistics indicate that only about half of the lateral partner hirings achieve these objectives. One of the reasons is that ... [l]ateral integration all too often it is not adequately implemented."

Given how big of an investment firms make in their partners and the benefits firms realize when partners succeed, it is particularly important that firms focus on lateral partner integration. In addition to the above onboarding tips, firms should consider the following integration practices when shaping their strategies.

Be Ready for New Clients: It is no surprise that a lateral partner's prime concern is making sure the transition is smooth for clients. Obviously, the firm must conduct conflicts checks. But once clients are cleared, administrators must ensure they are placed into relevant firm systems so partners can work on matters from day one.

"The sooner a new partner is comfortable that client engagement letters are in place and bills are flowing smoothly, the more quickly they can feel comfortable continuing with the rest of their integration activities," states NALP's *Lateral Hiring Best Practices Guide*.

Cross-Sell: A useful way to build connections and bolster a firm's investment in a lateral partner is to cross-sell. "You want to cross-sell your laterals to the intaking firm and clients," says Forman. "That is a great way to really integrate the new laterals."

Through this technique, lateral partners can connect with lawyers across the firm, as well as meet current firm clients. This practice can also encourage lateral partners to cross-sell by introducing fellow partners to the clients they bring to the firm.

Track with Metrics: Metrics are another helpful tool in integrating lateral partners. At Jenner & Block, the lateral integration partner receives metrics on new partners each month.

"These numbers allow us to send a red flag or give a pat on the back," says Wager, who notes that while metrics are not the only indicators of success, they are an important aspect to consider and are eagerly sought by the laterals themselves. And this type of data furthers the personal connection by providing an excuse to have a conversation, says Wager.

Create a Marketing Plan: Firms should provide lateral partners with a clear set of expectations, including hours and compensation.

"One of the most important things is setting of expectations," says Freeman. "It's surprising to me how many laterals I coach who, when I ask them if they have a clear understanding of what's expected of them, say they don't."

Firm administrators should sit with lateral partners and create a marketing plan, which allows both the firm and the new partner to understand the other's expectations. "The marketing plan needs to have a level of specificity to it,"

says Freeman, who notes that this plan should give both the lateral and the firm goals.



Provide Business Development Training: While firms may hope that lateral partners are equipped with business development skills, some may not be equally prepared. For example, attorneys coming from in-house and government positions may have contacts but "still don't have systems and processes to nurture those into clients," says Freeman. Providing business development skills training and time to build a book of business is a great selling point in attracting laterals, he says.

SETTING UP FOR SUCCESS

Firms put a lot of resources into hiring laterals, so it makes sense to have a solid plan in place to help welcome them to their new job. The firms that make the transition the smoothest will have the most success. ■

ABOUT THE AUTHOR

Mary Kate Sheridan is a writer and attorney with a JD from Columbia Law School and a BA in writing from Mary Washington College. She is currently pursuing her MFA in Creative Writing at The New School.



mk@marykatesheridan.com



www.linkedin.com/in/mary-kate-sheridan-b73b211a



twitter.com/MaryKateVS



Getting the Most From Client Surveys

Keeping in touch with your clients' needs is critical to running a successful firm.



KYLIE ORA LOBELL
Freelance Writer

Client surveys are essential to the success of a law firm. They present a unique opportunity to hear feedback from those that the firm serves, as well as have the power to change how the firm is run. By providing surveys to your clients as well as taking the feedback into consideration, you're ensuring the longevity of your firm.

"Every business should listen to its customers," says Jay Reeves, a consultant and former solo practitioner and corporate lawyer. "This is true whether you're selling iPhones, avocados or legal services. You want to know if your clients are happy when they leave your office — and, if so, why. That way, you can identify what's working and keep doing it."

That said, it's even more important to find out if your clients are unhappy. "Otherwise you won't know your weak spots, and you won't be able to target specific aspects of your practice that need improvement," says Reeves.

The first step in improving customer satisfaction is to come up with the right survey questions to ask.

CREATING A SURVEY CLIENTS RESPOND TO

Clients should be segmented into a few different groups. Then, you can determine the questions depending on what kind of group they're in.

“Every business should listen to its customer. This is true whether you’re selling iPhones, avocados or legal services.”

For example, Reeves says that if you’re a relatively new firm, you should focus on general topics, like whether the firm was prompt in returning a phone call, if parking was convenient, if the initial interview with long enough or too long, and if the consultation fee was reasonable.

For firms that have been in practice a while, Reeves recommends asking more specific questions, like whether clients visited their new website, if they read the client blog or newsletter, if they received sufficient notice of court dates, and how long they had to wait before meeting with lawyers.

“The best — and easiest — way to find out if clients are satisfied is to ask them,” says Reeves. “Otherwise, you are just guessing. And it is not enough just to ask. You also have to listen — really listen — to how they respond. Listening is a sign of respect. It shows you care. It builds relationships.”

Additionally, you should ask if the firm has been responsive, if clients feel the firm adds value to their projects, and what is their overall evaluation of the firm.

Another key element: brevity. Reeves says that writing up 10 or 12 questions is ideal, but no more, because you don’t want to overwhelm the client.



Sterling Miller, Senior Counsel at Hilgers Graben PLLC, adds that respondents should be able to complete the survey in 15 minutes or less. “The shorter, the better. People are busy and already taking the time to respond,” he says. “The quality of the answers deteriorates the longer the survey is.”

Adding radio buttons, drop-down options, and some open text boxes will make the survey more interesting and keep people engaged, too.

MAKING CONTACT

The easiest ways to send out client surveys these days include email, text messages and Google forms, says Jared Correia, Founder and Chief Executive Officer (CEO) of Red Cave Law Firm Consulting. You should aim to get a good cross-section of respondents so that you’re not acting on the outliers. “Then, the survey will identify a particular trend.”

“The best — and easiest — way to find out if clients are satisfied is to ask them.”

If Correia was going to deploy a survey, he says, he would focus it on the practice areas of the firm. For example, he’d send a specific real estate survey to the real estate clients.

Miller says that when he conducted his own client survey, he used a free online survey tool and sent the questions to his clients who were vice presidents. He and his team realized that was too small of a data pool, so they extended the survey to managers and a couple levels down after that. “Then we sent it to everyone. Even if they don’t respond, you build goodwill just asking people for their opinions.”

RESPONDING TO CRITICISMS

It’s inevitable that you will get some results that are critical of the firm’s performance. But it’s an opportunity for growth.

Client surveys are usually anonymous, so you can’t directly respond to criticisms and feedback unless someone volunteers

Though it may be harsh to hear some of the feedback, ultimately, your firm is going to grow because of it — and it's important not to take the results personally.

his or her information. But Miller says that at the end of his client surveys, he includes an area where clients can give their contact information and speak about an issue at length if need be. After he received the results from his surveys, he looked over them and then presented a summary of findings with the whole department. Staff members who received negative feedback were dealt with one-on-one, and not in a group setting.

Once everyone is briefed on the survey answers, Miller and his team came up with four to six takeaways. They then worked from those to determine goals for the next year. "We tasked people with coming up with ideas for themselves or the department as a whole," Miller says. "There's a lot you can do with a survey."

Correia says that when you receive survey results back, it's best to brainstorm how to fix any problems through committees. "If there is a partnership where a lot of lawyers have to make a decision, it can be hairy. It can be hard to get all lawyers on the same page. Set up a committee for marketing shared by a few attorneys and support staff," he says. "They get together and make recommendations, and then the firm votes on them."

Everybody should be involved in the vote, not just the lawyers. According to Reeves, you should be open about your survey

with your team so that they can contribute to the advancement of the firm. "Keep the survey results in-house," he says. "Share them with everyone involved in the chain of client service, from receptionist to managing attorney. Use the data to tweak procedures and improve performance, not to admonish staff."

Though it may be harsh to hear some of the feedback, ultimately, your firm is going to grow because of it — and it's important not to take the results personally.

"This is not about you," Reeves says. "It is not an exercise in building self-esteem. It's about your clients, and creating an awesome law practice that delivers consistent, top-quality service." ■

ABOUT THE AUTHOR

Kylie Ora Lobell is a freelance writer living in Los Angeles. She covers legal issues, blogs about content marketing, and reports on Jewish topics. She's been published in *Tablet Magazine*, *NewsCred*, *The Jewish Journal of Los Angeles* and *CMO.com*.



kylieoralobell@gmail.com



www.linkedin.com/in/kylieoralobell



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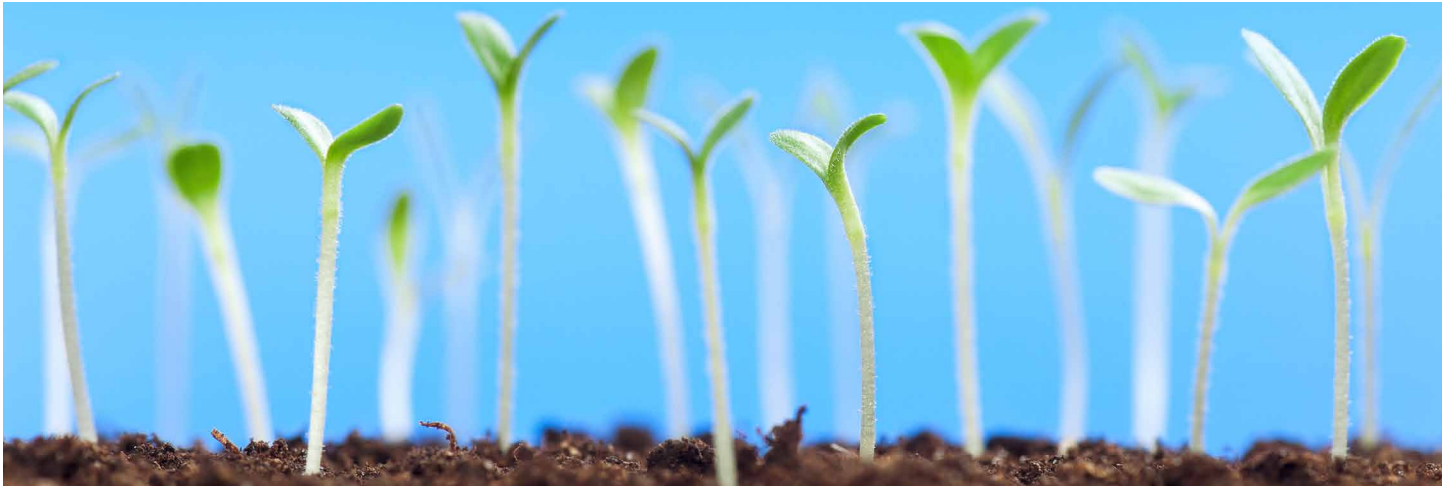
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MATTHEW HORN
Co-Founder
Legal Services Link

Thriving in a Changing Legal Services Market

Change has not come easy in the business of law. But, despite its reputation for preserving the status quo, there are progressive signs of innovation: the move away from the billable hour, a stronger focus on the role of the non-lawyer, and the emerging use of leading-edge technologies all show promise.

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Clients end up with a short list of messages from attorneys that know what their legal needs are, know what their budget is, and want to work for them.”

But will lawyers respond and change fast enough to keep pace with today's competitive forces?

The legal spend from corporate clients continues to decline or remain flat. The result: increased competition among law firms for a bigger piece of a smaller pie. At the same time, law departments are consolidating, or converging, their outside counsel firms to a much smaller panel of preferred firms. These are often large law firms with strong technology capabilities to bundle, automate and oversee a large portfolio of routine legal services. Those that get crowded out are often the smaller firms or solo practitioners.

At the other end of the market, consumers and smaller businesses have new options. They can choose a service provider instead of a lawyer. Innovations like LegalZoom benefit consumers by creating greater access to legal assistance, but lawyers are feeling the pinch as more and more business is siphoned away.

Competitive pressure from business and consumers has taken its biggest toll on solo practitioners and up-and-coming lawyers who need to build, strengthen or expand their areas of practice.

As the legal industry continues to morph and evolve, there are some strong strategies that you or your firm can consider to better position yourself or your firm's lawyers for success in a volatile and competitive marketplace:

Retain current clients. Start by securing your client base. Check in with your clients on current work and future plans. Have a stewardship conversation to confirm that the quality of work still meets or exceeds expectations. Ask for candid feedback, knowing that there’s always room to improve. Be open to new ideas and constructive feedback. Inquire about your client’s future goals and changing needs, and look for opportunities to help. Keep client service (communications, billing, planning and follow-up) accurate, timely and efficient. Remember, existing clients are an important source of new business.

Small steps can be smart steps. Think evolution before revolution when it comes to expanding your reputation. You have a business to run and client engagements that need your attention and focus. But to be more competitive and successful also means taking deliberate, thoughtful action. Start with one or two reputation-building projects, such as a well-placed industry article or a client industry conference presentation, before taking on bigger and bolder initiatives.

Seek new ways to reach new clients — and for them to find you. In our work with an innovation incubator in Chicago, we found that one of the biggest challenges for lawyers and clients alike is the age-old referral and networking process. When most people need a lawyer, they ask for a referral, as they have for generations. But asking around has its limits. It is difficult to find a knowledgeable, good-fit attorney for a particular legal need. At the same time, lawyers who are seeking clients often use traditional networks and are limited by geography and subject to poor timing.

Even with technology tools such as Google, LinkedIn and online law firm lawyer directories, the issue becomes finding a good mutual fit — the right expertise at the right price in the right timeframe.

This is where new online legal platforms come into play. These platforms connect people with legal needs to attorneys who are well-suited and ready to help. It works much like Uber, Air BnB, Task Rabbit and Lending Tree.

For the legal online platform, individuals and businesses post short summaries of their legal needs, identifying their budget, payment preferences and asking any essential questions that need to be addressed. Once submitted, the summaries are automatically emailed, anonymously, to all attorneys on the site that match the criteria of the request. Attorneys



can quickly review the summaries, and if they are interested in satisfying the clients’ legal needs, they submit messages directly to the potential client with all relevant information. At the end of the day, clients end up with a short list of messages from attorneys that know what their legal needs are, know what their budget is, and want to work for them.



In today’s legal services environment, smart and aggressive marketing is no longer an option. It is a necessity. New technologies play an important role in leveling the playing field in a competitive marketplace by broadening geographic reach and fostering direct communication at the time of need. ■

ABOUT THE AUTHOR

Matthew Horn is a Co-Founder of Legal Services Link. He launched the company with the intention of overhauling the legal engagement process, creating an online platform where individuals and businesses with legal needs can quickly and easily connect with qualified attorneys, exchange information, and enter into an engagement. Horn has also been a practicing attorney and a frequent speaker and author on various legal topics.

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The Samsung Galaxy S8 Makes Us Swoon

We're usually eager to be first in line to get the latest and greatest gadgets when they hit retail shelves. However, when Samsung finally released its latest smartphone model, the Galaxy S8, we were a little hesitant to purchase.

We had no qualms with the glowing previews of the S8, but we knew that acquiring it meant we had to give up our Galaxy S7 Edge smartphones. Over the past year, the S7 Edge has been the best smartphone on the market, in our view, edging out (no pun intended) the iPhone 7 and Google Pixel for smartphone supremacy. So why give up a good thing — no, a great thing — to try something new and unproven?

Well, we were told the S8 was every bit as good as the S7 and then some, so it only took a couple minutes of deliberation before we headed home with the new Galaxy S8 in our bags. Would we love it? Would it catch fire like the Note 7?

THE EYE OF THE BEHOLDER

We didn't want to say that the S8 made us forget the S7 ... but that is exactly what has happened.

First of all, the S8 is slender and sleek, taller than the S7 and thinner. Phone makers are continuing to pack more screen space into more compact form factors. The S8 feels smaller in your hand (and more accessible, especially for one-handed use), but you don't feel like you are sacrificing screen real estate. Samsung uses what it calls an Infinity screen to create a bezel-less, slightly curved 5.8-inch display. Even the physical Home button at the bottom of the phone has been removed and replaced with a soft Home button on the display.

Aesthetically, the S8 hits all the right buttons. If you are clumsy, however, you may want to buy a case for the S8. It's so thin, you may lose your grip on the phone. And, it is all glass, so it is vulnerable when dropped.

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As far as functionality is concerned, the S8 is a home run. It runs on a powerful new processor that is noticeably quicker than almost any smartphone we have tried.”

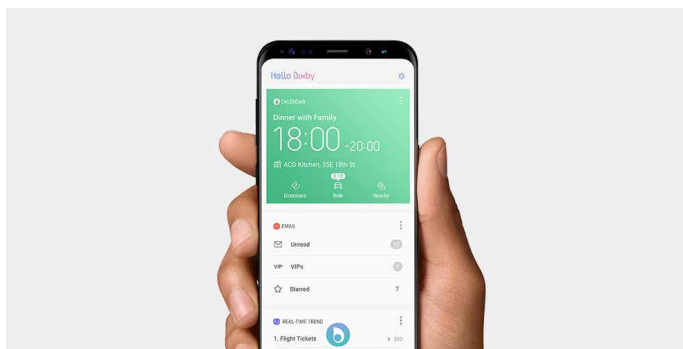


One feature that we loved on the Google Pixel phone we purchased last year was the fingerprint reader on the back of the phone. We found this placement made it much easier to unlock the phone with a fingerprint scan. Fortunately, Samsung copied this feature on the S8 and moved the fingerprint scanner to the back of the phone. Unfortunately, they placed the scanner slightly off-centered and right next to the camera lens. So it is very easy to smudge your camera lens when trying to swipe your finger over the scanner. This is probably the only design feature on the S8 that we found to be deficient and irritating.

NOT JUST SKIN DEEP

As far as functionality is concerned, the S8 is a home run. It runs on a powerful new processor that is noticeably quicker than almost any smartphone we have tried. We are told that the S8 is the first U.S. phone that is gigabit LTE compatible. This basically means that the phone is capable of connecting to the internet at much higher speeds, should the underlying provider network support those speeds in the future.

The camera (which was already good on the S7) is exceptional. Taking great photos is a breeze, even for amateur photographers like us. We really like the selective focus feature that allows you to focus on a particular object in the picture while blurring



everything else in the background. There is a professional mode you can enable if you are an expert photographer. Selecting the various options in the camera app is much easier on the S8.

Included on the S8 is a new feature called Bixby, Samsung's entry to the growing digital assistant market. Bixby is meant to learn the user's habits, preferences, schedule, etc., and provide helpful information relevant to the user at a particular time. It's even integrated into the camera app so that you can point the camera lens at an object and then click a Shopping button to shop for similar objects online. Samsung also touts a translation feature in Bixby that allows you to focus the camera on a document or sign and have the text instantly translated via the camera app.

In another first, the S8 is the first phone to support the new Bluetooth 5 standard. What this means is that you can connect to devices via Bluetooth over a longer distance (up to 120 feet) and also connect to two sets of headphones at once. Alas, no more sharing a single pair of headphones while watching a movie on your phone.

Thankfully, the S8 still has the old-fashioned 3.5 mm headphone jack for those of us who still use corded headphones. But Samsung did obsolete our old Galaxy power cords with the new USB-C charging port (although Samsung cordially provides a traditional USB adapter in the box).

FINDING LOVE AGAIN

Yes, we have forgotten that old Galaxy S7 model that is now sitting on top of the recycling heap. The S8 has captured our attention and, so far, we really like what we are seeing. It remains to be seen how the S8 will stack up against the upcoming new iPhone release, but it is clear that once again Samsung has moved the bar even higher.

The ball is now in Apple's court. ■

ABOUT THE AUTHOR

William Ramsey, Partner at Neal & Harwell, and LogicForce Consulting President **Phil Hampton** are best known for The Bill and Phil Show. The duo tours often and provides technology news and reviews on their website, www.thebillandphilshow.com.

 twitter.com/billandphil



JOBST ELSTER
 Head of Content & Legal Market
 Strategy, InsideLegal

Going Cloud First: Tomorrow's Vision or Today's Reality?

As more and more applications move to the cloud, a cloud-first strategy becomes an increasingly realistic enterprise option. And, as mentioned in previous columns, this is even starting to become a legitimate trend in the legal market. So what is this cloud-first strategy about, and what is its role in the legal cloud market?

“

Understanding the strategic business and financial drivers for a given initiative is key to defining the appropriate sourcing model.”

Cloud-first is a fairly self-explanatory business strategy built around the original goal of reducing IT costs by leveraging the benefits of using shared infrastructure and paying only for resources consumed. However, the business case for using cloud services is evolving from the initial focus on cost justification to a growing recognition of the dramatic role that the cloud can play in supporting the transformation to more agile, innovative business models.

IT industry analyst Gartner offers a pretty comprehensive checklist to help businesses identify what requirements they need to consider and how to set the framework for a successful strategy. Here are some of the key evaluation factors they recommend.

Business Outcomes and Financials: Understanding the strategic business and financial drivers for a given initiative is key to defining the appropriate sourcing model. Initiatives ought to align to an organization’s overarching strategic goals and associated IT guidelines.

Applications Suitability: A robust inventory of the existing application portfolio should be established to determine potential constraints and establish the right deployment models. Also consider what it will take to integrate various applications and what might be involved in getting existing apps cloud-ready.

Operational Impact: Moving applications, information and workloads to the cloud also warrants a relook at the operational and business processes. Given that the management

model for cloud-based services introduces new tools and capabilities, it becomes essential to revisit and optimize the existing model. Moving to the cloud requires much more than changing the storage location.

Skills and Capabilities: Certain skills and capabilities, as well as the ability to hire, build or enhance those skills within the existing organization, are often required by cloud-first initiatives or across external partners, and these are important considerations for sourcing. Going to the cloud and offsetting internal cloud expertise might provide firms with an opportunity to level the playing field versus better-resourced competitors.



Agility: One of the biggest organizational drivers to shift to cloud is to unlock greater agility and improve the velocity of innovation. It is essential to evaluate how the cloud service to be sourced balances freedom and control, enables flexibility and access, and can be seamlessly integrated into the existing operational model.

Security: Security risks posed by the location and type of data must be assessed by considering how access to the data and

identities (i.e., users, connected devices) will be controlled and protected. This is particularly sensitive and critical within the legal environment and has for many years been the top reason firms are late to the cloud game. However, within the last two to three years, legal IT leaders are increasingly recognizing the security value that reputable native cloud providers can bring to the table. Based on how they operate and secure their own systems, cloud providers are in the best position to serve firms with heightened cloud security measures largely unmatched by internal processes and protocols.

Data Sovereignty: One point of hesitation in the adoption of cloud for firms with data outside of the United States has been the lack of local cloud data centers. Similar concerns in Canada, EMEA and Asia-Pacific are also being addressed, as mainstream cloud providers — including Microsoft (Azure) and Amazon (AWS) — continue to expand their geographical locations.

If you're wondering who is adopting a cloud-first strategy and excelling, look no further than Microsoft. The software giant's Q3 fiscal 2017 earnings are rosier than ever thanks to its cloud solutions. Microsoft now has 26.2 million Office 365 cloud consumer subscribers, while server products and cloud services revenue increased 15 percent. Azure cloud infrastructure revenue itself grew by 93 percent. And there's no plateau in sight, with the cloud-first arms race between Amazon, Google and Microsoft only beginning to heat up.

At the end of the day, the decision to go cloud first is not just a location choice, but a transformative process that will affect all aspects of the firm's operations and infrastructure. While it is not a simple fix or easy upgrade, the staggering rate of cloud-first adoption should encourage, not discourage. ■

ABOUT THE AUTHOR

Jobst Elster is InsideLegal's Head of Content and Legal Market Strategy. He has served as a legal market strategist for the last 17 years, advising companies entering the legal market, involved in mergers and acquisitions, and expanding strategic operations overseas. Elster regularly writes and speaks on legal technology, market research and leveraging market data, technology innovations and futures, legal marketing and big data.



elster@InsideLegal.com



twitter.com/insidelegal

Be the House on the Block Where All the Kids Hang Out

By Patricia S. Algiers



Executive committees take note of measured outcomes. As a design concept, “the house on the block where all the kids hang out” was first discussed when Quarles & Brady LLP moved their Chicago office in 2008. The impact has been measured each year since.

In 2016, their hospitality team in the 86,000-square-foot LaSalle Street office handled more than 1,000 hospitality setups. The setups included hospitality associated with client meetings, but also client board meetings, trial training, startups summits, parties and celebrations, in-house training, law school alumni events, philanthropic and community gatherings, and political events. Plans that clearly outlined the intention to design the office as a hospitality hub drove success by connecting social interaction with good business.

Scott Watson, Office Administrator, was a part of the 2008 initial buildout and is now leading the 2017 refresh and expansion. Measuring the outcomes of the hospitality design concept has been part of the 2017 refresh programming review. Looking at how the space has been used gives answers to why and how a hospitality hub works and how

it can be key to taking the firm to the next level — in head count, influence and visibility.

Here are some things to think about to make your office an office a place where clients and the business community want to hang out.

DESIGNING THE OFFICE

Start out by forming a focus group with visionary, multigenerational representatives from all practice and administrative groups to identify, in a facilitated discussion, as many ways as possible to bring people into your space, including business functions, networking and socialization. Look to law firms as well as corporations, other professional service firms, and the hospitality industry for operational and design ideas.

Challenge your IT team to present a cutting-edge technology package to include all areas in your conference complex. Make sure to choose technology wisely, knowing it is used extensively — a high-tech feel translates as being relevant.

Next, work with your design professional to put ideas to paper. Have them show you concept space-usage drawings that address the look and feel of what the space could be. Talk through these drawings with all members of the focus group present at the same time.

Finalize the design based on the group’s input and consideration of a plan with the following features:

- Guests and clients are greeted immediately upon arrival.
- Comfort is foremost, and basic creature-comfort items like locating elevators, restrooms, coat rooms, and food and beverages are evident.
- The public areas (hub and conference complex) are separated from the private areas (attorney and staff office areas).
- Signature food and beverage items — i.e., candy or chocolate, specialty coffee or tea, lemon water — are part of the experience.

Make sure to choose technology wisely, knowing it is used extensively — a high-tech feel translates as being relevant.

- Furniture is located to encourage conversation. It should be accessible to all people, regardless of any physical limitations.
- It can be memorable, giving visitors a reason to tell others about the experience of being at your firm.
- The space works with views and daylight and is an inviting space from early morning to dusk, when meetings and gatherings would occur.
- The design is authentic and appropriate to the region. Stay away from generic designs that could be any place on the planet.



Finally, engaging, happy and hospitable people as your brand ambassadors are an important consideration for your receptionist and conference center staff.

THE ROLLOUT

Debut your interactive conference center with an opening event that incorporates a theme. This makes invitees want to attend for reasons other than the obvious. Make sure the experience is memorable, because if so, it surely will be told to others.

Give the rollout a full-court press, including social media. Remember that your office is only new for a short period, and getting as much exposure as soon as possible maximizes the buzz.

MAINTAINING THE HUB

Freshen up on a regular basis. Untouched, any design dates itself both operationally and aesthetically. Keep your hub neat and tidy, as well — touch up paint on a regular basis, and immediately attend to coffee spills.

Keep introducing your hub to new audiences. Encourage using the space for things like client, board and alumni meetings, and discuss new usages as a regular line item on the agenda of practice group and firm meetings. You should also use your hub as the backdrop to media and social media photos.

It's also a good idea to take mental notes of what others do in their space and at their functions, and bring applicable ideas back to incorporate into your hub.


As a law firm, you have all sorts of tools and ways to grow your market share. Space matters and is a tool. If you leverage your space, you can make your office that “house on the block where all the kids hang out.” If your office is well-designed aesthetically, functionally and operationally, your bottom line can feel the impact. ■

ABOUT THE AUTHORS



Patricia S. Algiers, ASID and CNU-Accredited, is the President and Founder of Chemistry in Place, a firm focused on combining creativity with design, real estate and business expertise. Algiers and her team help clients rethink, rebrand, redesign and reinvent the way they do business.

 algiers@chemistryinplace.net

 414-963-1613

 www.linkedin.com/in/patriciaalgiers

 www.chemistryinplace.net/

2017 Annual Conference & Expo Highlights

A big thank-you to the 1,050 attendees and more than 150 exhibitors representing nearly 200 booths at the 2017 Annual Conference & Expo in Denver, Colorado. We hope you walked away with plenty of inspiration, new connections and cutting-edge solutions that you can put into practice right now at your law office.

With the close of the conference, ALA President Gary Swisher II, CLM, and the 2017–2018 ALA Board of Directors took office. Additionally, new volunteer members officially joined ALA's standing committees and regional representative positions. View the complete list: alanet.org/about/about-ala/leadership.

We'd also like to give a special thanks to the 2017 Annual Conference Planning Committee for all the work they did to make Denver such a huge success! View the entire photo collection: alanet.org/ac2017/about/photos-from-ac-2017.



The 2017–18 ALA Board of Directors (front row, left to right):

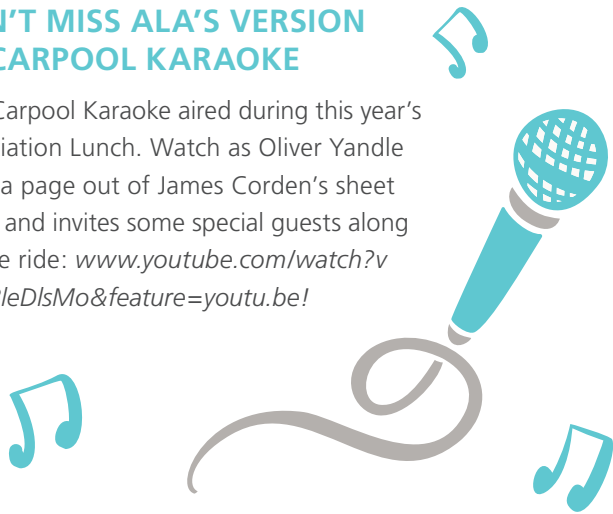
Laura J. Broomell, CLM, Immediate Past President; April Campbell, JD, President-Elect; Julie S. Logan, SPHR, SHRM-SCP, At-Large Director; (second row) Katie Bryant, CLM, At-Large Director; Debra Elsbury, CLM, Region 3 Director; Lori A. Hughes, Region 5 Director; (third row) Shaun Morrison, Region 6 Director; Michael T. Bumgarner, CLM, CPA, CGMA, At-Large Director; (back row) James L. Cornell III, Region 4 Director; Gary T. Swisher II, CLM, President; Joseph A. Samarco, MBA, Region 1 Director; Oliver Yandle, JD, CAE, Executive Director. Not pictured: Vicki L. Smith-Bilt, CLM, SPHR, SHRM-SCP, Region 2 Director.



2017 Annual Conference Planning Committee (from left to right): Shelley A. Strong; Travis C. Armstrong, CLM, CPA; Lynn Martin Johnston; Carol A. McCallum, CLM; Andrea L. Myers, CLM; Laura T. Sears; Lisa A. Waligorski, CLM; Patricia A. Winter, PHR, SHRM-CP; Richard J. Nigon, CLM; Jerry G. McPeake. They are joined on stage by ALA President Gary T. Swisher II, CLM (far left) and Immediate Past President Laura J. Broomell, CLM (far right).

DON'T MISS ALA'S VERSION OF CARPOOL KARAOKE

ALA Carpool Karaoke aired during this year's Association Lunch. Watch as Oliver Yandle takes a page out of James Corden's sheet music and invites some special guests along for the ride: [www.youtube.com/watch?v=dtFBleDlsMo&feature=youtu.be!](http://www.youtube.com/watch?v=dtFBleDlsMo&feature=youtu.be)



THE CAPITAL CHAPTER GETS ANOTHER 60 SECONDS OF FAME

ALA tasked its chapters to get creative and create a 60-second video to illustrate their love of ALA. For the second year in a row, the Capital Chapter delivered and took home the crown. View their winning entry and congratulate them on another job well done: [www.youtube.com/watch?v=U_qLTesWoCw&feature=youtu.be!](http://www.youtube.com/watch?v=U_qLTesWoCw&feature=youtu.be)



PAST PRESIDENT DON AKINS AWARDED FOUNDERS AWARD

Several years ago, the ALA Board of Directors created an award to recognize individuals for their exceptional contributions to the legal management profession — the Founders Award. This recognition, named in honor of ALA's Founders Mary Ann Altman, Bradford W. Hildebrandt and Robert I. Weil, was last awarded in 2010.



Barbara Akins and her two daughters, Cindy and Sherry, accept the Founders Award on behalf of Past President Don Akins.

"This year, Don Akins posthumously received the award for his passion for the association and the profession it serves a passion that lived on well beyond his retirement," noted ALA Past President Laura J. Broomell, CLM in her speech to the Association Lunch crowd. "He was a beloved mentor to many of my predecessors, and one who was very in tune with the pace of change affecting the legal industry. He knew that responding to that change was always going to be part of legal management professional jobs and the role of ALA. Akins joined ALA on day one and worked tirelessly for our members, the profession and the association."

Don served as ALA's third president, and his passing last June was felt by many. His dedication to ALA and mentoring others lasted long after he retired. Don's wife, Barbara, and their two daughters, Cindy and Sherry, were in Denver to accept the award on his behalf.

"People have told me that Don was 'one of the good guys;' we lost him too early," noted Barbara as she accepted the award. "But whatever he may have done in his personal life, his interest in ALA and the Foundation never wavered. He was honored to visit with your chapters and get to know you better. He was proud of all of you and promoted the profession and ALA to the legal community."

CONGRATS TO OUR 2017 AWARD RECIPIENTS

On April 5, conference attendees dressed in their best to attend the closing festivities, which included the presentation of our 2017 Awards Program recipients:



NEW: ELEVATE ALA AWARD

The Elevate ALA Award recognizes up to three chapters whose efforts in professional development, networking and visibility demonstrate advancement in the areas of educational content, member-to-member and member-to-business partner relationships, and ALA's prominence in the legal community.



Greater Los Angeles Chapter, Elevate ALA Award

The first recipient was the Greater Los Angeles Chapter. This chapter spans more than 150 miles, which can sometimes make attendance at popular meetings a challenge. Understanding the value and importance of face-to-face networking opportunities, the chapter's leadership changed the meetings to occur in various regional "hubs" around the area. All hubs are connected by technology services such as WebEx, video conferencing or conference calling. The chapter also recognized that they had members who wanted to take the Certified Legal Manager (CLM) exam but couldn't always attend ALA events to get the necessary credits. They have made a concerted effort to apply not only for recertification credits for chapter course offerings, but also application credits.



Mobile Chapter, Elevate ALA Award

The next recipient was the Mobile Chapter. The chapter's education committee is charged with ensuring all five education areas specified by ALA's Knowledge, Skills and Abilities list are covered. Additionally, the committee recently developed a Continuing Legal Education session as a means of raising the awareness of ALA in the legal community. Chapter members were encouraged to attend as well, to help bolster the chapter and its membership in the eyes of the attorneys and with smaller firms that may have potential new members. The chapter is committed to funding scholarships and encouraging members to take full advantage of the many opportunities offered by the chapter and the association.



Atlanta Chapter, Elevate ALA Award

The third recipient was the Atlanta Chapter. The chapter's leadership realized that they needed to elevate the level of education they offer. So the Board responded by restructuring the educational program. Leadership also focused on increasing member and business partner engagement. Surveys showed that members value networking as much as they do education, so the chapter held several events focused solely on networking and relationship building. They added a "Game On" challenge to all members in March 2016. This web-based tool for member engagement awarded points to members for various activities, such as registering for and attending meetings, reading and commenting on articles, connecting with other members, and referring new members or business partners. Leaderboards were announced at each chapter meeting, and cash prizes were awarded at the holiday luncheon for the members with the most points.

OUTSTANDING ASSOCIATION VOLUNTEER AWARD

Each year the Board of Directors identifies members who have made significant contributions to the association.



William Mech, Outstanding Association Volunteer Award

This year's first Outstanding Association Volunteer award went to William Mech of Cunningham Meyer & Vedrine, PC, in Warrenville, Illinois. Bill has served as President for two ALA chapters and has since served on the Business Partner Relations Committee, and as At-Large Director on the Board. He is also Chair of the newly formed Standards Review Committee. His most recent and notable contribution to ALA, however, is the work and energy he has put into the development of the Uniform Process Based Management System (UPBMS).



Lisa Dasher, Outstanding Association Volunteer Award

The second Outstanding Association Volunteer Award went to Lisa Dasher, CLM, CPA, CGMA. Lisa's service includes holding positions on the Regional Nominating Committee; on three Annual Conference committees, including serving as Chair; and as Regional Representative. She is currently a member of the Professional Development Advisory committee and an instructor for ALA's eLearning Financial Management courses.

QUEST AWARD

The Quest Award recognizes a new member of ALA for his or her conviction, dedication and relentless pursuit of personal and professional excellence. There were more than 500 eligible candidates this year, eight of whom were nominated by their chapters for this recognition.

This year's Quest Award winner was Sonji Le Blanc of DLA Piper in Phoenix, Arizona. Sonji immersed herself in ALA from day one. She attended the 2016 Chapter Leadership Institute, last year's Regional Legal Management Conference in Phoenix, and attended this year's Annual Conference & Expo. Her chapter describes her as engaging, genuine and, above all, dedicated to her fellow members. After a lunch with a board member, she readily agreed to serve on the chapter's Board of Directors and Co-Chair the chapter's Diversity and Inclusion Committee. When the position of Vice President opened unexpectedly, she stepped into the role without hesitation.

Sonji also used her expertise to provide the chapter with support in the social media arena. According to her fellow chapter members, she really gets what it means to be involved at all levels, not just those projects that bring you the most exposure or accolades. She works just as hard behind the scenes as she does anywhere else — all while starting a new position at a global firm and relocating her family from Los Angeles to Phoenix.



Sonji Le Blanc, Quest Award

IDEA AWARDS

ALA's IDEA Awards program, now in its fourth year, seeks to recognize initiatives that model innovation, development, engagement and advancement in the legal community. Awards are presented to ALA chapters, committees, regions, individuals, firms or organizations (including business partners) that create unique and innovative programs, services and events. This year's recipients are:

Chuhak & Tecson, PC, leveraged its talented women attorneys to attract clients from women business owners, decision-makers, buyers and strategic partners — a market into which the firm had not yet specifically tapped. The Women Helping Women after-hours networking group offers professional women the opportunity to build their businesses while participating in charitable services at the same time. While enjoying wine and hors d'oeuvres, each Mix-and-Mingle highlights a different nonprofit agency serving women or women and their children. The program has seen outstanding success and benefits to the community. Fourteen different organizations have benefited from this event, including several groups that provide services to women and children in their local community.



Chuhak & Tecson, PC, IDEA Award



The New Jersey Chapter, IDEA Award



Philadelphia Chapter, IDEA Award

The New Jersey Chapter of ALA recognized its good fortune in having a large membership and solid business partners. It decided to extend an opportunity for “adoption” to a smaller chapter with fewer resources at hand, and chose the Central Pennsylvania Chapter for its first “Adopt a Chapter” program. The adoption is intended to improve educational opportunities, give members from both chapters the opportunity to meet their regional peers, and to introduce potential business partners. In addition, the Central Pennsylvania Chapter received \$3,000 in scholarship money, which it will use to send several board members to the 2017 Chapter Leadership Institute.

With less than 10 percent of chapter members under the age of 35, the Philadelphia Chapter was faced with growing concerns about succession and membership demographics in the future. So its board decided to start a social media campaign to reach out to the Millennial generation. The chapter joined Twitter and created a YouTube channel to showcase its members’ relationships and expertise, as well as profile the chapter in an engaging way. Their tip series, in particular, highlights the knowledge of chapter members across a variety of functional areas.

Complete details regarding ALA’s IDEA Awards program can be found at alanet.org/awards.

PRESIDENTS’ AWARD OF EXCELLENCE

The Presidents’ Award of Excellence is a performance guideline used to encourage chapters to take effective and collaborative action in support of ALA’s mission to promote and enhance the competence of legal management professionals; improve the quality of management in law firms and other legal service organizations; and represent professional legal management and managers to the legal community and to the community at large. This recognition was specifically designed to honor our Past Presidents. ALA recognized 57 chapters who have achieved this honor by their work throughout the past year. They and their chapter leaders deserve a tremendous amount of credit and respect.

CONGRATS TO THE FOLLOWING CHAPTERS:

Alamo	Columbus	Greater Chicago	Kentucky	Mobile	Philadelphia	Tulsa
Alaska	Cyber	Greater Cincinnati	Knoxville	New Jersey	Pittsburgh	Western & Central New York
Arizona	Dallas	Greater Kansas City	Las Vegas	New Mexico	Puget Sound	Wisconsin
Arkansas	Downeast	Greater Los Angeles	Maryland	New Orleans	Raleigh/Durham	
Atlanta	East Bay	Hawaii	Metropolitan Detroit	New York City	Richmond	
Austin	First State	Houston	Middle Tennessee	Nutmeg	Sacramento Valley	
Boston	Fort Worth	Independence	Mile High	Oklahoma City	San Diego	
Capital	Gateway	Indiana	Minnesota	Orange County	Silicon Valley	
Central Florida	Golden Gate	Jacksonville	Mississippi	Oregon	South Florida	



The Foundation's Board of Trustees: Front row (left to right): Timothy R. Blevins; April L. Campbell, JD; Wendy Rice-Isaacs, CLM; Back row (left to right): Oliver Yandle, JD, CAE; Patricia L. Groff, CLM; Stephen G. Dempsey, CLM; Stephanie Hood. Not pictured: Gary T. Swisher, II, CLM; Grace C. Lopez

SILENT AUCTION NETS \$30,000 FOR THE FOUNDATION OF ALA

At this year's 2017 ALA Annual Conference in Denver, the Foundation once again held its Silent Auction to benefit the programs it supports throughout the year. Because participants were so very generous with your donations and Silent Auction bids, the Foundation raised more than \$30,000 this year! These funds will be used to provide quality inspirational speakers at future David Brezina Memorial General Sessions, scholarships for CLI through the Susan B. French Scholarship Fund, and the Foundation's newest initiative, the Administrative Pro-Bono program. In addition to supporting these worthy initiatives, the auction provided good-natured competition among bidders for many coveted items.

The Administrative Pro-Bono program will match the expertise and skills of our members, business partners and other ALA-related professionals to the needs of our local legal service organizations, which offer critical legal services to an already underserved population. The trustees look forward to sharing more about this in the coming months and thank you for participating.

To learn more about the Foundation, visit alanet.org/about/about-ala/foundation. If you are an emerging leader who might benefit from Foundation support to attend CLI in Minneapolis, visit the Foundation's home page and click on the application link under "The Susan French Emerging Leader Scholarship Fund." **The deadline to apply is May 21.**

ANCHORS AWEIGH TO NATIONAL HARBOR!

The 2018 Annual Conference Planning Committee is already hard at work to ensure that next year's conference is a great success. Be sure to save date for next year's Annual Conference & Expo, May 3-6 at the Gaylord National Resort & Convention Center in National Harbor, Maryland!

The 2018 Annual Conference Planning Committee: Top row (left to right): Karen Turner; Ruth Fry; Travis Armstrong, CLM, CPA; Middle row (left to right): Karen Godfrey; Gloria E. Hernandez, CLM; Beth Fowler, CLM; Front row (left to right): Laura Sears; Richard Nigon, CLM; Rose Jaworecki



COULDN'T JOIN US IN DENVER?

Virtual Conference recordings from three sessions at Annual Conference are now available. If you didn't get a chance to join us for HR30: Marijuana in the Workplace, LI32: Alternative Approaches to Secretarial Support, or FM34: Financial Reporting Checklists, you can purchase the recordings to view at your convenience.