

2019 IDEA Awards: Summaries of Entries

These entries received the 2019 IDEA Awards:

First Five Moderators

“ALA First Five Online Community”

Contact: Suzy Klepac, sklepac@kirkandchaney.com

The [First Five Community](#) is an online resource and forum for legal management professionals in their first five-*ish* years of their career. It was first conceived by three early career legal managers — Suzy Klepac, Sarah Antonello and Danita Jones — at the 2018 Annual Conference & Expo. The free community was developed with technical assistance from ALA headquarters, but the moderators were the driving force behind its format, original content and overall strategy. They designed a judgment-free zone that enables professionals who are new to the legal industry or new to managing to become seasoned, well-rounded leaders in this field. As of November 2018, the community had 80 subscribed members, and its most popular posts included the networking-themed “Introduce Yourself!”, the how-to “E-Billing” and the “Law Firms 101” guide. The moderators hope to expand First Five’s mentorship to the nearly 1,500 new members who have joined ALA in the past two years.

[View the submission’s video](#) that aired at the Association Awards Gala.

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The IDEA Award Project Team wishes to extend special kudos to this entry:

Capital Chapter

“*ELEVATE* – Virginia Legal Management Professionals Newsletter”

Contact: Megan Pfeifle, megan@cookcraig.com

This project built off the success of the *Friday Fast Five* newsletter, [which received an IDEA Award in 2018](#), and the strong relationships among the Virginia chapters of ALA: Northern Virginia, Richmond, Hampton Roads and Western Virginia. While celebrating 10 successful years of the Virginia Statewide Retreat, the Retreat Committee decided to further unify the chapters by creating a joint quarterly newsletter, *ELEVATE*, that would keep chapter members connected and informed year-round. Each issue features educational content, conference recaps, chapter highlights, invitations to events all over Virginia, and advertisements that raise money for the Virginia Statewide Retreat. Every quarter, the editor’s message comes from a different chapter president. Articles are authored by conference speakers, chapter members, Virginia law firms and business partners. The newsletter — which in 2018 reached about 400 people from the four chapters, the West Virginia Chapter, independent members who live in the area, and business partners — has also become a vehicle for new business relationships. The Northern Virginia Chapter made use of the newsletter to gain four additional business partners, and two of the chapters added *ELEVATE* ads as benefits in their business partner sponsorship agreements to aid in future sales.

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The other entries:

Hogan Lovells

“Innovating Leadership Development: A Business Simulation for New Equity Partners”

Contact: Michelle Nash, michelle.nash@hoganlovells.com

Global law firm Hogan Lovells wished to emphasize the importance of new equity partners shifting their focus away from building their individual book of business in favor of driving profitability for the firm as a whole, motivating and leading teams, and modeling the firm’s culture. To do so, Hogan Lovells created an innovative leadership development program informed by market data and feedback from recently promoted partners. The dynamic, multifaceted Transition to Equity business simulation launched in 2018 to welcome 23 new equity partners. In the realistic simulation, they were asked to step into the role of practice leadership and apply legal and business acumen, leadership skills, organizational direction and strategic thinking to make real-time decisions around the business of law, marketing and business development, and talent management.

Teams of four or five partners competed by making collaborative strategic decisions around pricing services, employing legal project management, motivating and training associates, and investing in client relationships. As a result of this wide-ranging, real-time simulation, these new equity partners experienced a shorter learning curve and established strong, sustained connections across offices and regions. New business ideas even sprouted from these exercises.

Bellefield

“Compliance with Outside Counsel Guidelines at the Point of Time Entry”

Contact: Sharon Stewart, sharon.stewart@bellefield.com

Bellefield Systems’ new solution, OCG Live™, enables firms to manage client billing guidelines in real time, increasing compliance and communication. In return for this enhanced compliance, clients will be unlikely to reject or appeal bills, collection realization will improve and revenue will benefit. Bellefield developed this tool in response to the legal industry becoming more of a “buyer’s market,” forcing law firms to comply with client demands and expectations. One such demand is outside counsel guidelines for billing — which can be difficult for firms to comply with due to the sheer volume and frequency of updates. However, the OCG Live engine provides a centralized location for billing guidelines and allows firms to manage compliance at all levels, grading time entries for compliance against guidelines and flagging any that are in violation. Timekeepers can fix their own time cards and billing coordinators can easily source issues, which reduces time spent on cleanup and ensures that bills are in compliance before they’re sent to the client.

BigHand

“DLA Piper Implements BigHand Now and Successfully Improves Back-Office Efficiency”

Contact: Laura Foster, laura.foster@bighand.com

BigHand responded to the increasing shift from the “practice of law” to the “business of law,” as well as associated needs to improve efficiency and reduce costs, by developing BigHand Now, a task delegation and workflow management solution. The company partnered with BigLaw firm DLA Piper, which was restructuring its back office, to test the tool’s ability to eliminate the operational blind spot and give firm leadership full visibility into and control over their back-office operations and legal support teams. BigHand Now provided a dynamic, highly visual tool to TK the firm’s shared-resource model of administrative support, demonstrating tasks, enhancing communication and allowing managers to assign responsibilities according to skills and capacity. In addition to improving turnaround time, this exposed back-office staff to new tasks and helped them achieve growth and job satisfaction.

According to their case study, BigHand Now improved back-office efficiency, while reducing the cost of delivering administrative services across 28 DLA Piper North American offices with over 2,000 employees. The future of this tool will include enhanced reporting and integration of [ALA’s Uniform Based Process Management System \(UPBMS\)](#) to provide industry benchmarks for costs, staffing needs and delivery metrics.

Traveling Coaches

“OnGuard Security Awareness Consulting Program”

Contact: Kristy Nowell, knowell@travelingcoaches.com

Traveling Coaches created the OnGuard program to help law firms implement the ongoing education needed to keep their users knowledgeable about security threats. The company’s uniquely packaged consulting service — which includes regularly updated content, resources, tools, best practices and methodologies — enables legal organizations to establish a long-term culture of security awareness. Clients have reported that OnGuard has helped their personnel realize their part in the firm’s overall security efforts, provided everything they needed to set up an information security program, and constantly engaged employees in heightened security awareness in a nondisruptive way. “Since the introduction of OnGuard, we definitely receive more calls, questions and ad hoc comments, reflecting an active engagement by employees — a true barometer of awareness,” says Joe Palmeri, Chief Information Officer and Managing Director of Kramer Levin, a 700-person firm and one of Traveling Coaches’ clients.

Capital Chapter

“Career and College Readiness Workshops”

Contact: Jenna Carter, jenna.carter@ropesgray.com

The Capital Chapter has partnered with the YMCA DC Youth & Government Program for more than four years to help that initiative achieve its goals of providing mentors and career opportunities for local young people — particularly those attending poor-performing schools. The chapter’s four-week course provides college and career preparedness, leader development and, ultimately, empowerment. Students learn about business etiquette and communication, résumé writing and interview skills. Participants in the résumé workshop walk away with a completed document for applying to jobs and

internship, while participants in the interview workshop work with Capital Chapter members — many of whom serve as hiring managers — and get immediate feedback about how to present themselves, what questions they should ask, what their perceived strengths are and what areas they should continue to develop. Capital Chapter members get a recurring opportunity to volunteer with underserved communities, and the participating youth gain practical skills and networking connections for college and the workforce.

“A Chapter Where Everyone Knows Your Name”

Contact: Blythe Peelor, bpeelor@michaelbest.com

With about 350 members, the Capital Chapter is lucky to not have to scramble on member recruitment; however, with such a large membership base, engagement is a *significant* challenge. To increase retention and members’ feeling as though they belong and can call on their peers for advice, the Capital Chapter adopted a theme for 2018: “Where Everybody Knows Your Name” (think *Cheers*). The chapter took several actions to facilitate this theme, from improving its social media presence to providing members with business card holders that come preloaded with cards from the Executive Committee, other leaders and business partners. They also renamed all committees to “communities” to encourage collaborative environments where everyone can contribute, and they offered ribbons to allow members to self-identify with certain specialties and communities, making it easier for people in similar circumstances to find one another and to discover new connections outside their circle.

San Diego Chapter

“Business Partner Program and Event Revamp Was No Trivial Matter”

Contact: Karen Lemmon, kklemmon@sbcglobal.net

The San Diego Chapter Board recognized that member engagement with business partners was not as robust as it had been in the past. In response, they revamped the chapter’s Business Partner Program to encourage better participation from members and lasting commitments from business partners. On the business partner side, the chapter introduced new incentives for sponsorship, including a place on the newly created Business Partner Advisory Board, ad placements, and the opportunity to present a seminar at a Membership Meeting or provide an article for the chapter’s e-newsletter. To increase member engagement, the chapter changed the annual Cocktails & Connections event from “speed dating” to a trivia-night format featuring rotating teams, collaboration and unforced interaction. (There were also prizes and a Regional Legal Management Conference scholarship awarded.) No additional funds outside the usual Business Partner Program budget were necessary, and the project was deemed a success. Business partners offered positive feedback; sponsorship renewals progressed ahead of schedule. Members enjoyed the trivia night, appreciated the natural connections they made, and referred business to companies they interacted with there.

Houston Chapter

“Houston Chapter: Educate to Elevate”

Contact: Wendy Crane, chaptermanager@alahou.org

The Houston Chapter created an initiative to drive member engagement in events held by the chapter and ALA international. First, they made the tough decision to discontinue the traditional chapter retreat, instead redirecting funds to support the 2018 Regional Legal Management Conference in Austin, Texas, because the latter event offered far more educational opportunities. The chapter reimbursed the Regional registration fee for anyone who attended two of the four business partner events held by the chapter — incentivizing engagement and attendance. They also organized transportation and chapter dinners to introduce the intra-chapter networking element that made the retreat so popular. The chapter board's goal was to get at least 20 members to attend the Regional conference; they succeeded in registering 31, most of whom had their fee reimbursed. Overall, the initiative gave the Houston Chapter access to more continuing education hours and more networking activities at minimal cost to the members.

Central Florida Chapter

“Elevate Orlando Scholarship”

Contact: Katie Shaw, kshaw@zkslawfirm.com

In February 2018, Ray Herod, a CFCALA Board member and Past President, was introduced to Elevate Orlando, an expansion of Denver, Colorado's UpLift organization, whose goal is to empower urban youth to become leaders and productive citizens through long-term, relational support. CFCALA decided to provide a graduating high school student with a scholarship for higher education. Its goal in implementing this idea was to partner with this organization that, while new to the Central Florida area, was quickly changing the young lives of local students. A few members volunteered to be on the interviewing committee. They attended the three high schools where Elevate Orlando had been implemented and interviewed one Elevate student at each school. The students were unaware that they were competing for a scholarship. They were asked to be ambassadors of the Elevate Program and to inform the interviewing committee about the program and what it has done in their life. All three students had amazing stories about how the program changed their trajectory in life, but it was student Claudel Dera's moving story that won him the scholarship. The funds for the \$1,000 scholarship came from the chapter's Silver-Level Business Partner Package. Claudel's story touched the membership and, seeing the difference that Elevate has made in their community in 10 short years, inspired CFCALA to continue this scholarship in the coming years.

Metro Detroit Chapter

“Summer 2018 FOLLOWPALOOZA”

Contact: Terri Spitzig, tspitzig@dt-law.com

The Metro Detroit Chapter of ALA launched a social media campaign in the summer of 2018. Through a series of designed emails, legal management professionals and business partners were invited to enter a sweepstakes by following the chapter on social media channels and joining the chapter. Prizes ranged from Starbucks gift cards to a trip to a 2019 ALA Conference & Expo. The purpose of this sweepstakes was to boost the social media presence of the chapter. The tangible goals of the campaign were to increase social media followers by 10%, onboard two new legal management professionals, and sign on

two new business partners. The campaign took about one month to plan, and the sweepstakes lasted for five weeks. The span from the inception of the project to notifying the winners was two-and-a-half months. The cost of the sweepstakes was budgeted as a membership growth initiative, and as the sweepstakes was an entirely online experience, no volunteers, fundraisers or in-kind resources were necessary. The social media campaign ended up increasing the previous amount of social media followers by 100%. It also resulted in two new members and four new business partners. The chapter is looking into making this type of social media innovation and sweepstakes a staple of their regular marketing strategy.

Oklahoma City Chapter

“ALA OKC Business Partner Town Hall”

Contact: Suzy Klepac, sklepac@kirkandchaney.com

The ALA Oklahoma City Chapter understands that maintaining relationships with their business partners is vital to resources, funding and memberships. Their business partners have a wide reach into the legal community, often identifying potential members who have not yet heard of ALA. They can educate these potential members on the benefits of the ALA. The chapter created the Business Partner Town Hall to reconnect with long-standing business partners and find out what issues were plaguing the business partner program. Through facilitated discussions, a satisfaction survey and developing resolutions, they were able to jump-start their relationships. The Business Partner Town Hall highlighted the business partner program’s weaknesses and identified ways the chapter can strengthen those areas. It also gave the business partners, the Board, and the Business Partner Committee a renewed passion for ensuring the business partner program is the most valuable program that they can offer.

The ideas that came from the Town Hall will be implemented over the next few years, which extends the relationship between membership engagement and recruitment and partnerships with business partners. In the future, the chapter plans to hold a Business Partner Town Hall at least every three years to stay on top of their game and make sure the program is the best it can be. OKC strives to show business partners how important they are and that they value not only their sponsorship, but also their services, relationships, ideas and input on how OKC can provide a quality business partner program. The chapter’s hope is that the program will be flexible enough to adapt to everchanging needs and provide benefits that business partners simply cannot find elsewhere.

Stoel Rives LLP, Portland Office

“Stoel Rives and Beaverton High School — Future Day!”

Contact: Dorianna Phillips, dorianna.phillips@stoel.com

The Future Day program was designed to connect Beaverton High School students with jobs and employers of interest with the guiding principle that “if you can see it, you can be it.” It was an excellent opportunity for employees of Stoel Rives LLP’s Portland office to inspire students exploring the workforce to determine who they want to be when they grow up.

Stoel Rives hosted 12 freshman and sophomore students in the office for a tour of the facilities, a moderated panel, including lawyers and staff members, and a round of “speed networking.” The students then sat with members of the firm over lunch to discuss what they learned from the event and ask any remaining questions. Stoel Rives team members pitched in to make the event a great success. Students were able to connect with different types of professionals, hear advice on how they could develop as workforce newcomers and learn about the many opportunities within law. They also had the chance to talk about life with adults who were eager to help them along in their journey. This event allowed Stoel Rives team members the opportunity to engage with young people — and potential talent — in the community. Moreover, Stoel participants also provided inspiration and advice to students who may not have had an opportunity to talk with an adult outside of their teachers, parents or coaches.

Stoel Rives Future Day had a great impact in the community — all because each participant, and the firm — recognized the need to contribute to the community and to help others along in their personal and professional journeys.

Greater Chicago Chapter

“GCC Driving Professional Development for ALA Members Across the Country!”

Contact: Michael Motyka, mmotyka@marshallip.com

The Greater Chicago Chapter’s Certified Legal Manager (CLM)[®] study program is well-known for being one of the strongest — if not the best — in the entire Association. It was submitted for an IDEA Award in 2017. Since the chapter formalized its program, it has focused on expanding its reach beyond the Windy City. Many ALA members find the prospect of studying for the CLM exam daunting, as they believe they have few resources and little support. Now, they can formally join the Greater Chicago Chapter’s study program at no charge. They enjoy the fruits of the GCC’s heavy investment in CLM education in person or via webcast: 16 weekly study sessions, 4 review sessions, weekly emails with new tips and materials, weekly quizzes, and a substantial library of resources housed in Google Drive. The study group’s instructors include experienced attorneys, real estate experts, insurance experts, business partners and current CLMs. Further, the chapter’s CLM Director contacts every study group participant to learn about their challenges in order to customize the review sessions.

Almost 70% of the GCC study group participants were members of other chapters. Overall, 40% of all new CLMs in 2017 and 2018 were participants in the GCC study group. This group alone has accounted for a 2% increase in new CLMs — growing the ranks, preparing members for success and advancement in the legal management field, and elevating the profession.

Alan Wilson, Rich Wilson, Katie Bryant

“Dos and Don’ts of Business Partner and Member Engagement”

Contact: Alan Wilson, alan@qljinsurance.com

ALA member Katie Bryant, CLM, and business partners Alan Wilson of GLJ Benefit Consultants and Rich Wilson of VIBE recognized that the ways attendees and exhibitors interact often aren’t productive.

Previous attempts to solve this problem have been text-based and, frankly, boring. They figured a new, innovative approach was required and decided to produce a humorous, scenario-based video to impart memorable information about improving engagement. VIBE contributed the videography and editing for free, the actors were volunteers, and the venue was secured at no cost. The video debuted to acclaim at the Chapter Leadership Institute (CLI) in July 2017. Since then, 30–50% of chapters have shown the video to their membership and business partners. (At least one business partner told the Arizona Chapter that it was the best tool to advance engagement that he had ever seen an association produce.) Additionally, Alan Wilson has booked many chapter speaking engagements to present a seminar — that includes the video — on elevating member/business partner relations.