

## **Mutually Beneficial Relationships: Performance Guidelines for ALA Members and Chapters and Legal Industry Consultants & Business Partners**

ALA is grateful for the support legal industry consultants, suppliers and vendors (hereinafter referred to as “Business Partners” or “business partner community”) offer to our Association, both financially and by offering quality education. These Business Partners also provide vital service and operational support to our legal organizations. To help foster stronger working relationships between ALA and the business partner community, ALA’s Board of Directors established the Business Partner Relations Committee (BPRC) and the Business Partner Advisory Panel (BPAP). With that in mind, the BPRC and BPAP have prepared guidelines and objectives to further enable ALA chapters and members to develop and enhance productive working relationships with the ALA business partner community, as well as offering guidance to the business partner community for establishing mutually beneficial working relationships with ALA chapters and members.

ALA members are reminded, and business partners should be aware, that ALA’s Board of Directors periodically reviews and reinforces that ALA members adhere to high ethical standards. To that end, ALA has established a set of professional ethics which apply to all members (<http://www.alanet.org/about/ethics.pdf>). The ALA Code of Professional Responsibility (the “Code”) is an extension of ALA’s values and reflects the Association’s commitment to ethical administration of legal practices—private firms, legal clinics, corporate legal departments, governmental agencies and the courts.

While we recognize business partners are independent entities, the practices and actions of a business partner, whether for or on behalf of ALA or in matters unrelated to the Association, may impact and/or reflect upon the Association. For this reason, ALA encourages all business partners to respect and support the principles and rules of conduct, as outlined in the Code, that its members are expected to incorporate into their everyday performance.

Furthermore, the BPRC and BPAP strongly encourage ALA members and ALA business partners to become familiar with, and meet or exceed, the following guidelines. These guidelines are intended to advance the Association’s mission (see [www.alanet.org](http://www.alanet.org)) and to strengthen the relationships between Business Partners and ALA members.

### ***For the Business Partner community...***

**Commit to Open, Honest and Ethical Interaction.** Business Partners and their employees, agents and subcontractors (collectively referred to hereinafter as “Representatives”) should be aware of the Association’s commitment to business integrity. Take the time to educate your representatives to ensure they are familiar with the Code and these Performance Guidelines. Our business partners are encouraged to exercise sound judgment, discretion and moderation when offering gifts or entertainment to ALA members.

**Professional Conduct and Avoiding Conflicts.** Except when legally obligated to do so, privileged, confidential information acquired in the course of doing business with ALA, its members or its members' employer organizations should not be disclosed to third parties. Be sensitive to actual or apparent conflicts of interest.

**Due Diligence & Best Practices.** Learn as much as possible about the member's employer organization prior to an initial appointment. Seek out and schedule an appointment with the professional manager who is responsible for your particular product or service. Consider approaching each contact, meeting, phone call, negotiation and proposal as a partnership, and strive to develop long-term relationships. Providing exemplary customer service before, during and after the purchasing decision will help foster long-term relationships.

**Educate ALA Members.** In many cases, business partners are at the leading edge of knowledge for their respective products and services. ALA members look to industry representatives to become more informed about products and trends that will enhance the quality of services delivered by their organizations. While highlighting your company's virtues, service advantages and accessibility, also take the time to share information about trends developing within the legal industry.

**Compliance with Applicable Laws, Regulations & Rules.** Be mindful of the applicable laws and regulations of ALA members' respective countries while conducting business with and/or on behalf of ALA and its members. Also, be aware of any antitrust and fair competition laws that govern the jurisdictions in which they conduct business. Respect ALA's commitment to human rights, equal opportunity in the workplace, employment practices and all applicable laws and regulations.

**Use of the ALA Logo.** Refrain from making statements or claims that would reasonably suggest or imply to any third party that the business partner is a member of ALA or that ALA or its chapters have endorsed the business partner's products or services. Secure written consent from ALA headquarters prior to using the Association's logos, trademarks or service marks.

***For the ALA member community...***

**Be Open to New Business Partners, New Ideas.** The more successful business partners are at the leading edge of their respective legal industry service niches. Make an effort to understand all that they have to offer. With so much diversification, many of the business partners who have been around for a number of years have acquired or developed new lines of business. Do not always rely on old information or assumptions.

**Their Time is Valuable, Too.** If you are too busy to talk, offer another time for the business partners to follow-up with you. Be considerate of their schedules and daily pressures. While part of their job may be to sell, they also have the demands of servicing existing clients.

**Be Honest About Your Intentions.** Let them know about your organization's goals and priorities, and share information about budget constraints. If there is a bid process, be candid with information and facts necessary to prepare the proposal or response.

**Identify the Key Players and Decision Makers.** If you are the decision maker, say so. If you are not the decision maker, make sure the business partner knows who will be making the decisions, and on what basis the purchasing decision will go forward. Give the business partner the

opportunity to meet the (other) decision makers. Both sides may learn of important information leading up to the proposal stage.

**Treat Business Partners with Respect.** Most business partners are competent in their discipline and deserve your respect. When treated with that respect, business partners can be your best allies. Remember that business partners also use legal services, and they may be a potential client for your firm. Treat the business partners the same way you would treat a potential client.

**Accounts Payable.** If your firm or legal department has specific dates for action on invoices, make sure and let the business partner know those dates and times. This may increase loyalty and their desire to work with you in the future.

**Your Business Partners Deserve Your Trust.** In many cases, business partners are service and operations extensions of your organization. Just as you would communicate problems to your support staff, so should you share appropriate success and failure information with your business partners. If a business partner makes a mistake, deal with it immediately. Tell your business partner what happened, and why. Let them know in a firm and professional manner what they could have done to make it better – and/or allow them to fix it. You will find that most business partners are glad that you have told them about the problem or allowed them to take remedial action. It should ultimately improve the level of service.

**Give Credit Where Credit is Due.** Many business partners are used to the same “crisis management” situations that administrators regularly experience. Most understand “last minute emergencies,” and are happy to respond. When they do respond, let them know how much you appreciate their work. They may make you look good—help them to look good, too. This small amount of recognition could make the difference between a mediocre relationship with a business partner and a great one.