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ALA's UPBMS is filling a void and providing a standard for classifying legal operations.





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

“

Steve will be terribly missed, but his impact on so many of our lives will always last.”

Aloha, Steve Wingert

Writing this column can sometimes be a challenge. I've had cases of writer's block. Or, at the other extreme, I've struggled to settle on one or two key messages when there was so much to report. But this column is, by far, the hardest.

On March 18, Steven D. Wingert, CLM, ALA Past President, lost his courageous battle with pancreatic cancer. All of us who were fortunate to know him lost a true friend, leader and mentor. His membership profile lists countless volunteer positions, speaking engagements and accolades — all testament to the many contributions he made to the organization. Each year, I attend a leadership conference with the incoming ALA President. One of the exercises asks us each to think about a person who represents our mental model of leadership. Every year, without exception, for both the new president and me, that model has been Steve Wingert.

Therefore, it's no surprise that in 2015 Steve was awarded the Spirit of ALA Award, the Association's highest honor. The ALA Board of Directors created this award for individuals who demonstrate a special and unique achievement. Steve embodied all of these qualities.

Steve had just become ALA President in May 2012 when I was lucky enough to be chosen as ALA's Executive Director. That year, the Annual Conference & Expo was in Hawaii. I was hopeful the final-round interviews would be held in Honolulu; unfortunately, they were not. The O'Hare Crowne Plaza hotel does make a nice mai tai, though.

Shortly after the conference, in his first column for this magazine, Steve talked about the meaning of the Hawaiian word “aloha.” The word consists of two parts: *ha*, which refers to the breath of life or the internal part of our being, and *alo*, which is how we carry ourselves on the outside — our demeanor and presence. As I discovered in my own research, it is a word rich and deep with meaning. Much more than a greeting, it is a way of living, an attitude. It conveys guidelines to help us live our lives. There is even a website, Live Aloha, dedicated to promoting this spirit and inspiring people to embody it in their everyday lives.

Here's what it says:

"Aloha means we are able to recognize and appreciate the uniqueness and differences each of us bring into this world. Honor and respect your family, friends, and all the people who pass through your life. Aloha does not pass judgment on others for it always trusts, always hopes and always protects.

It is that aloha, caring and spirituality that allows us to build on each other's strengths and join together on this magnificent journey we call 'Life.'"

And so it seems appropriate that his presidency began in the land of aloha, as his life and leadership exemplified all that the

word conveys. Steve will be terribly missed, but his impact on so many of our lives will always last.

Aloha, my friend.

CELEBRATING STEVE

Celebrations of life will be held on Saturday, April 27, at the Journeyman Hotel in Milwaukee, Wisconsin, from 4 to 8 p.m. and on Saturday, May 4, at Digress Wine in College Park, Florida, from 4 to 8 p.m. ■



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ALAN WILSON
National Program Director,
GLJ Benefit Consultants

“

Instead of shutting down or avoiding conversations because we don't need something right now, we open up opportunities for building long-term relationships.”

Member and Business Partner Interaction and Engagement

ALA's Annual Conference & Expo is upon us once again. I can almost feel the energy and excitement from here as I sit typing on my keyboard. We will see old friends and meet new ones. We will have the opportunity to sit in on educational sessions and rub shoulders with some of the brightest minds in the business of law. From the educational sessions to the Exhibit Hall and the Welcome Reception to the Grand Finale, the week is sure to be full of growth, fun and memories made.

As a business partner, I am especially looking forward to interacting with membership and engaging in meaningful conversations on how I and the many other business partners in attendance can be a valuable resource for each of you and your firms. This may come as no surprise, but these interactions are at the top of my mind. But what may surprise you is why.

Over the past few years, I've been involved in many of the speaking engagements on the importance of member and business partner interaction and engagement and how these interactions — when done correctly — can be beneficial for *everyone* involved. In fact, you may have even seen a humorous yet educational video on the dos and don'ts of member-business partner interactions that I helped create with ALA member Katie Bryant, CLM, and VIP business partners GLJ and VIBE. (If you haven't had a chance yet, take a moment to check it out: <https://bit.ly/2YHxNS8>.)

While perhaps a bit exaggerated, the video demonstrates some key elements for avoiding common faux pas and, perhaps more importantly, creating mutually beneficial engagements. Further, I think it is safe to say that we can extrapolate a few dos and don'ts for all:

BUSINESS PARTNERS

- Be kind.
- Become a resource.
- Respect time.
- Invest in long-term relationships — play the “long game.”
- Listen, listen, listen.
- Learn and educate your team about ALA.
- DON'T be a pest; be a resource! “No” means no and “not now” means not now.

MEMBERS

- Be kind.
- Utilize your resources (the business partners!) and share.
- Respect time.
- Provide opportunities for long-term relationship building.
- Listen, listen, listen.
- Learn about business partner goals.
- Be honest. If the answer is “no” or “not now,” consider becoming an advocate for the resources available instead.

A CULTURE OF INTENTIONAL COMMUNICATION

While these lists are likely not exhaustive, they do provide a good snapshot of ways we can all embrace the member-business partner relationship. Further, they provide an excellent jumping-off point for building what I like to refer to as a culture of intentional communication.

Let's be honest. With every interaction we undertake, whether conscious or not, we all have our agendas. Business partners have quotas to fill and bottom lines to improve. Members have the needs and demands of their respective firms, attorneys, staff and partners to juggle. The point is not to ignore those agendas, but to mutually embrace that they exist and work together in order to see how those agendas can become overlapping goals. When we do this, we take our first step into the realm of intentional communication. Instead of shutting down or avoiding conversations because we don't need something right now, we open up opportunities for building long-term relationships.

So as I said, let's be honest. As a member, you can't do business with everyone, and it's OK to say you are not interested at this time, that you're not the decision-maker for a specific offering, or that you are simply not in the market right now. Many of our favorite and highly productive relationships

over the years have been with members who have never purchased one service or product.

How could that be? What these members do for us is advocate, introduce, invite and refer us to decision-makers, other members in their firms, or even other members of their chapter, which has led to great relationships and business. One of my favorite stories to tell is of a member in Arizona with whom we built a relationship with over years and years of interaction, all the while knowing she would never buy one product or service in her current position at her firm. Fast forward seven years later — this member changed firms, became a chief administrator, and her first call on day one in her new position was to ... you guessed it! We now not only enjoy the fruits of maintaining a valued relationship, but are also honored to provide products and resources to this great member.

Over the last 14 years of GLJ's relationship with ALA, it has become clear to us that the success we have experienced within ALA has come from one constant — our linchpin



element of success if you will — the importance of obtaining a clear understanding of the goals of members and business partners alike.

Maybe your goals are about providing your chapter with quality education opportunities. *Members, have you reached out to the business partners to see what kinds of educational resources they can provide?* Maybe you're interested in increasing membership. *Business partners, have you considered how you can create long-term relationships within ALA by sharing with current non-ALA clients the many benefits of membership?* Or maybe you are simply trying to find the right solutions for your firm. *Members, are you taking advantage of the VIP business partner programs and offerings (alanet.org/vip)?*

One thing is for certain: The first step is to start an honest conversation. And what better place to start that conversation than in the Exhibit Hall at Annual Conference!

At the end of the day, how we interact with each other in business settings is the key to building long-term fruitful relationships. With that in mind, I invite each of us to help

make this conference a success by engaging with sincerity and intent.

That said, let me be among the first to welcome you to ALA's 2019 Annual Conference & Expo! ■

ABOUT THE AUTHOR

Alan Wilson is the National Program Director for GLJ Benefit Consultants (GLJBC). He started working with GLJBC in 2004 as an Employee Benefits Specialist. Since 2006, Wilson has spearheaded the effort within GLJBC to reach out to law firms nationally regarding their benefits and how to use those benefits to help attract and retain quality personnel. He has written articles for *Legal Management*, speaks frequently on benefits at conferences, and consults with individual law firms nationally.



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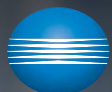
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SCOTT MCFETTERS
*Founder and President,
 CoreTech Leasing*

How Leasing Aligns Finance, Operations and Tech Needs for Your Firm

“

Equipment leasing and financing is a strategic solution law firms can take advantage of to face the intricate challenges of technology and embrace the countless opportunities and security benefits it offers.”

The top three concerns of chief legal officers, according to the Association of Corporate Counsel, relate to law firms’ cybersecurity abilities and governance over their data. Technology adoption, not surprisingly, has become a central strategy that firms leverage to meet client demands — but few people were likely to forecast just how large the legal tech market would become in such a short period of time. Legal tech investment reached \$1 billion in 2018, as reported by AI legal tech startup, LawGeex.

Despite this investment in technology, the actual adoption of it hasn’t been easy, let alone a cure-all. In this way, legal is no different than any other vertical — selecting and owning a technology are very different from its successful implementation and adoption to improve operations. That’s why we see ILTA’s 2018 Technology Survey listed cybersecurity and technology updates as the second and third most recurrent concerns for firms.

As technology continues to become an imperative function for firms, security concerns increase and data protection is essential. In the past three years, data breaches have become commonplace, and firms have had to up their games to protect client data.

We have seen major global players like DLA Piper become a victim of a cyberattack that led to a complete shutdown of its digital operations. Firms are making drastic changes to ensure they are secure; this requires an operational transformation as well as a financial plan. For many firms, the move to the cloud allows for increased security and reduced liability. According to the 2018 Enterprise Cloud Trends Report, organizations — including law firms — are investing more in the cloud, with nearly every organization planning to increase enterprise spend in the areas of cloud and Software as a Service (SaaS) over the short- and long-term.

IS LEASING RIGHT FOR YOUR FIRM?

The changing landscape demands maximum flexibility and requires applying your resources in a smart and efficient manner. New tools, products and solutions are developed every day, creating a marketplace cluttered with options that cater to every business need.

Leasing delivers that agility. Equipment leasing and financing is a strategic solution law firms can take advantage of to face the intricate challenges of technology and embrace the countless opportunities and security benefits it offers.

Let's delve deeper into some of these opportunities:

- 1. Investment in top-of-line hardware:** The purchase of technology such as desktops, laptops, tablets, printers and servers is a massive commitment. As law firms look for operational efficiency, funds locked in depreciating assets do not appear favorably on the books. With an equipment lessor, firms only have to identify their needs and find the right options.

Equipment leasing, unlike purchasing, is not a capital expenditure and does not affect a firm's debt covenant. Even in the updated 2019 lease accounting tax law, leases will be categorized as nondebt, making this a rational option for law firms.
- 2. Flexibility:** 2018 was the year of law firm mergers and acquisitions, with numbers exceeding historical averages with a total of 72 mergers — a 10 percent increase over 2017 as reported by *The American Lawyer*. In such uncertain times, instead of securing equipment for teams that may not be with the firm six months from the date of purchase, firms can choose to lease equipment per their evolving needs. Leasing agreements can be drawn for the short- and long-term and are a great way to bring agility to a law firms' operations.
- 3. Security:** In the era of enhanced cyberwarfare, firms are expected to offer the highest level of security for all the confidential data they hold. When new upgrades are released, a firm will need to protect itself and its clients with the most up-to-date versions of security technology available and, therefore, firms may not want to purchase the technology or software outright. In this case, financing is an intelligent option, both financially and for security reasons.
- 4. Cloud migration:** Law firms have become more dynamic in the way they serve clients. They are increasingly leveraging the flexibility of cloud solutions for various aspects of their operations, including document management systems (DMS), deal rooms, extranets, e-discovery, litigation support, and of course the rampant adoption of Microsoft Office 365. Moving to the cloud is a two- to three-year decision. During that time, it does not make sense to purchase your firm's

hardware. Rather your firm should consider leasing to match the IT hardware expense to the asset's useful life.

- 5. Easy maintenance:** Once you sign a lease for your equipment, maintenance becomes the responsibility of the lessor. So instead of paying an in-house tech support team and bearing the cost of salaries and benefits, firms can ask for round-the-clock support from the lessor.
- 6. Customized offering:** Hardware-software combinations that best suit different roles have led organizations to reject the notion of one-size-fits-all in their technology choices. While original equipment manufacturers (OEMs) offer corporate deals for firms with sizeable orders, a lessor can truly understand your firm's requirements and build a custom package that offers variety and matches each role's unique needs.
- 7. End of lease options:** At the end of lease period, leasing contracts offer firms a variety of options — from disposal to refinance along with system upgrades to outright purchases at a discounted price.
- 8. 100 percent financing options:** A zero-down-payment structure with custom payment schedules can make a world of difference in a law firm's accounting. Equipment lessors function on a vast pan-industry scale and can offer favorable deals to firms that banks or corporations might not be able to.
- 9. Inflation protection:** Equipment leases follow fixed monthly payments (in dollar amounts or in percentages), shielding law firms from currency fluctuations as well as market inflation.

In conclusion, the days when firms could succeed through traditional relationships and ever-growing demand are over. Instead, firms need to provide their lawyers with top-of-the-line equipment, along with the mobility, speed and flexibility of the cloud. They need to manage their cash flow and spending carefully, as well as have the flexibility to change their strategic direction on a dime. Leasing can help them do that. ■

ABOUT THE AUTHOR

Scott McFetters is Founder and President of CoreTech Leasing, an independent technology and equipment lessor servicing more than 100 of the nation's most distinguished law firms. McFetters speaks widely on best practices in technology and equipment finance; his articles have been published in *Legal Management*, *Legal IT Professionals*, *Forefront* and *Law Journal Newsletters' Accounting & Financial Planning for Law Firms*. CoreTech proudly provides year-over-year sponsorships of key industry events such as the ALA Annual Conference & Expo and ILTA, among others.

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ERIN BRERETON

Owner, Chicago Journalist Media

While very large firms may have the resources to create a proprietary tech product from scratch, for firms without a robust internal development team — or the budget to hire freelance software engineers — an off-the-shelf solution will likely be a more cost-effective option.

Whether a firm has a specific product in mind or just suspects new technology might improve operations, examining all potential software choices can help ensure it settles on the right one, according to Elizabeth Brooks, Co-Founder of Nimble Consulting Services, which provides legal technology selection and implementation assistance. She'll also be presenting on the topic and ALA's Annual Conference & Expo.

"The RFP process is pretty well understood, but sometimes we see people jumping to conclusions because their neighbor used something in the past," Brooks says. "They're not really pausing to define what requirements they think they need, developing use cases and actually seeing what technology solutions exist in the marketplace."

Clarifying expectations and performing due diligence work can vastly improve the outcome of the software selection process.

Clarifying expectations and performing due diligence work can vastly improve the outcome of the software selection process.

Before your firm decides to make its next significant tech investment, it may want to consider taking the following steps.

DETERMINE WHO'LL INVESTIGATE AVAILABLE SOLUTIONS

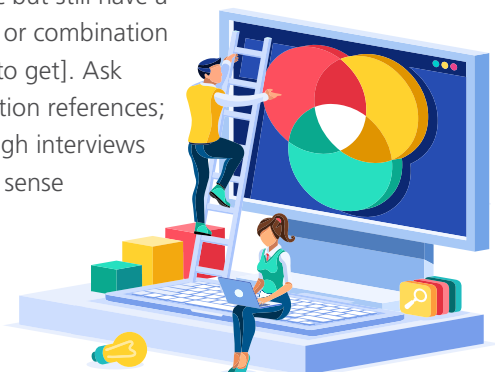
When the Connecticut-based Milford Law firm decided roughly five years ago to become a paperless office, Partner Vincent Averaimo initially hoped to research the possible technological options. He soon realized working with a consultant might be a better scenario for the firm.

"Obviously, I didn't have the same level of expertise, and being an eight-staff-member, four-attorney law firm, if I spent the time that was needed to vet companies without assistance, we'd be working [with] a man down, and losing that one revenue source could be detrimental to the practice," Averaimo says.

Some consultants primarily focus on a specific product, either because it provides the best commission or the consultant has implemented it before and is comfortable working with it, according to Alexander M. Babenchuk, Operations Manager at national law firm Sanders Phillips Grossman — which in recent years has added asset management software and case management and other solutions.

Babenchuk, who has used in-house personnel and consulting companies to select software, recommends meeting potential consulting candidates in person.

"We have them come in and try to figure out whether they're only selling one brand," he says. "A lot are trying to be vendor-agnostic but still have a certain formula or combination [they urge you to get]. Ask for implementation references; generally, through interviews you get a good sense of what you're going to get."



REQUEST A REAL DEMO

Tech vendors are often willing to walk you through how a piece of software is used; many say they'll provide a customized demonstration. In reality, though, they often present a canned version, according to Babenchuk.

Firms need to ensure any software they choose doesn't hinder their ability to perform certain tasks, such as being able to pull reports.

"They ask what you want to see in the demo," he says. "Then they pull the logo off my website, put it in their system and run through the same demo process they show everybody."

Diane L. Camacho, CLM, President and Chief Executive Officer of solo and small firm management consultancy DLC Consulting Services, suggests firms ask vendors for detailed examples to make sure they understand how the product works — and whether it would satisfy their specific needs.

"The demo is done by salespeople who most likely have never worked in a law firm, or with a service company," Camacho says. "Usually, the attorneys are in a hurry and don't drill down enough to be very specific. They don't say, 'You're saying I can calendar my court dates; show me how to do that with a Superior Court in Oakland.'"

KEEP INTEGRATION IN MIND

A product may address a pressing problem your firm needs to solve, but will it also work with other systems you have in place?

Firms need to ensure any software they choose doesn't hinder their ability to perform certain tasks, such as being able to pull reports.

"[Some items] offer very limited reporting; you have to download everything to Excel and modify it. Are you going to do that? How frustrating will it be?" Camacho says. "It's important to have a program that you can get financial reports out of, whether it's [accounting software] or a time and billing program, to figure out if you're making any money."

If a software provider won't let you sample its product, to avoid buyer's remorse, Camacho suggests asking for a monthly contract.

INVESTIGATE EXTRA EXPENSES

Firms sometimes overlook software licensing details, according to Brooks, which can impact a solution's overall cost.

"Think that through — how many people need to use the system?" she says. "If you need to add more people, what will that cost? Usually, it's not just an all-you-can-eat model. Don't get caught unaware; that can vastly affect price."

ADDRESS IMPLEMENTATION NEEDS

Temporary help may be required to facilitate software deployment. When Milford Law went paperless, the firm didn't initially clarify who'd perform the associated scanning work in its initial agreement with the consultant it engaged.

"I knew my staff didn't have enough time to sit there and scan documents," Averaimo says. "We immediately came to the conclusion the consulting company should have their people — whoever they hired as a temp or someone within their business — come into the office as a final component of the project."

CONFIRM WHO YOUR CONTACT WILL BE

Whether a business partner or consultant will be handling implementation, you want to know exactly who is going to be doing the work, and their background with the particular application, according to Bill Painter, Chief Innovation Officer and Shareholder at 750-attorney firm Baker Donelson, who also serves as Chair of the firm's Technology Committee.

"A lot of times, consultants bring in a team to sell something, and the person who shows up at the door [to pitch it] and the one who starts to work on it are not the same person," Painter says. "[Ask], 'Are you going to be the one in the room with me who I want to talk to?'"

After finding out vendors sometimes outsource implementation to a third party, Babenchuk's firm now sends two contracts, for the software and the implementation process, when adding new technology.

"[We've had] good and bad implementations where one the company knew the exact software and did well; others just started working with it three months ago, so they had a lot of

questions," he says. "Implementation is 85 percent of what you're buying, because if it's not correct, no one will use it — so the entire purchase is a waste."

TRY TO TEST THE PRODUCT

Baker Donelson's Technology Committee, comprised of shareholders, attorneys and office administrators, serves as a sounding board for the firm's technology team, viewing demonstrations and sampling products to provide feedback on how they may serve end-users.

Painter recommends initially running a new application in a test environment to see what impact it may have on your systems — and to allow end-users to see what it does or doesn't do.

"We had a situation a year or so ago where the initial group had reviewed a software package and thought it was fine," he says. "We rolled it out to a test platform, and the feedback was it was clunky and didn't work well. There were a lot of issues; we pivoted and went in another direction."

If a software provider won't let you sample its product, to avoid buyer's remorse, Camacho suggests asking for a monthly contract.

"Don't let the salesperson sell you for a year if you're not comfortable with it — that's a long time," she says. "Spend the extra \$2 a month and buy it for three months on a month-to-month basis. Give it three months, and if you're still frustrated and not getting the support you need, if you don't think it's going to get better, don't be afraid to back out." ■

ABOUT THE AUTHOR

Erin Brereton is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.



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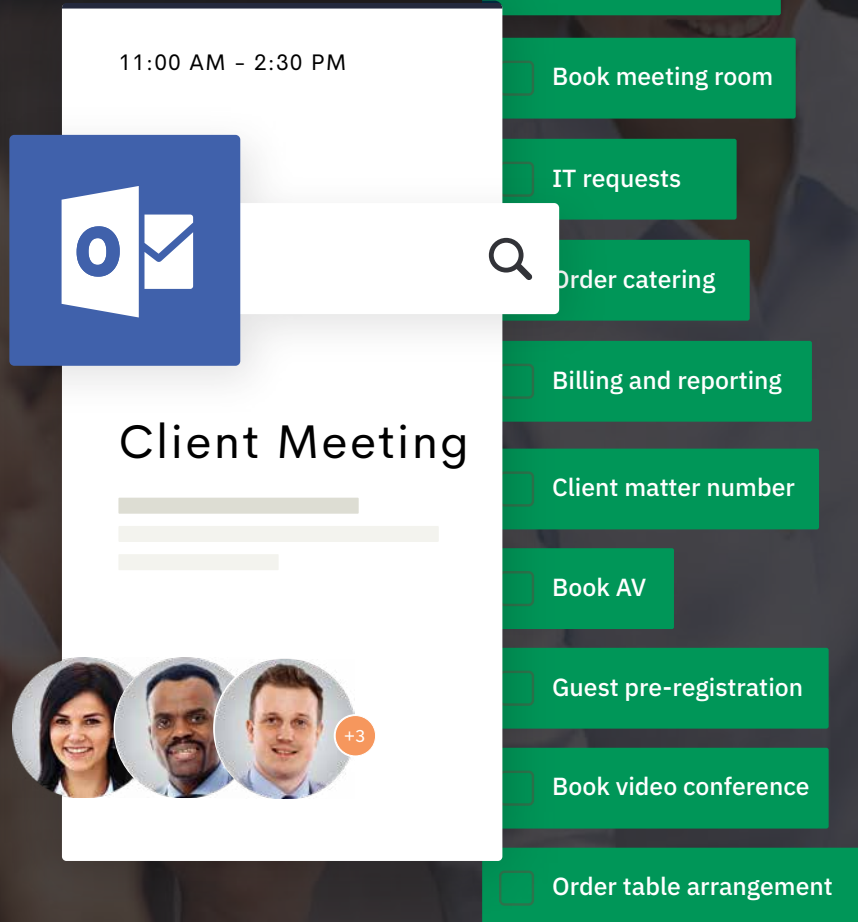


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Unified Approach

ALA's UPBMS is filling a void and providing a standard for classifying legal operations.



VALERIE A. DANNER
Senior Managing Editor,
Legal Management

It's no secret: Client demands drive legal. Clients control the purse strings, and they will continue to push for more efficiency and transparency from their legal departments. Simply tracking attorneys' time isn't a good gauge of the amount of back-end work — or the cost associated with it — that goes into delivering legal services. ALA's Uniform Process Based Management System (UPBMS) is leading the charge to change this. This set of codes was developed to provide a standard framework for defining and classifying legal operations.

Until now, the legal industry has had no universally recognized standard that improves the understanding of how administrative and operational processes are identified, organized and performed within their organizations. So for the past several years, ALA has been working on developing a taxonomy to create this standard. Coding standards make a big difference, as is evident with the American Medical Association's Current Procedural Terminology (CPT®) — a universal coding system developed nearly 50 years ago. Just as these codes went a long way to streamline reporting within the health care industry, the UPBMS aims to do the same for back-end legal operations.

Nearly three years after the first version launched, Version 2.0 is set to debut. But the UPBMS is already in use. In 2018, ALA put the UPBMS to work in practical applications — as a key part in developing its Job Description Toolkit, for instance. This marked a bit of milestone in the process.

"Once I familiarized myself with the UPBMS, it helped simplify the process of developing new job descriptions. It allows the user to apply clear and consistent criteria when creating a new job description."

"The UPBMS being put into action is exciting to see," says Oliver Yandle, JD, CAE, Executive Director of ALA. "It's been such a dedicated effort by ALA volunteers and staff to get this taxonomy into a place so that the legal industry can work from a common language for legal support operations."

Laura R. Wickliff, PHR, SHRM-CP, Chief Human Resources Officer with Snell & Wilmer LLP in Phoenix, Arizona, was on the Job Description Toolkit project team. Her role was to help create the toolkit and provide examples of job descriptions in several categories that could be accessed by fellow ALA members.

"I used the UPBMS codes as part of the job descriptions to help clarify and categorize the essential duties for each job description," says Wickliff. As she worked on the project, she was impressed with how the codes streamlined the process. "Once I familiarized myself with the UPBMS, it helped simplify the process of developing new job descriptions. It allows the user to apply clear and consistent criteria when creating a new job description," she says.

WHAT'S NEW

It's progress that has been a labor of love for volunteers like William Mech, CLM, Chief Operating Officer at Goldberg Kohn, Ltd., in Chicago, Illinois, and the Team Leader on the UPBMS project. Mech says Version 2.0 is an enhancement that includes revisions from the first version. "Each version of the UPBMS reflects literally thousands of small editorial revisions from the previous version; Version 2.0 is no exception," says Mech.

The latest update reflects several significant improvements, including:

- **More Detailed Organization:** Version 2.0 has the code sets grouped into two branches of activities: Legal and Support. "In the previous version, legal activities (activities most commonly performed by paralegals and other paraprofessionals) were contained in a classification labeled Practice Support. Legal activities are now in a dedicated branch, improving the organizational logic of the entire code set," says Mech.

- **Improved Logical and Consistent Structure:** The Classification of Common Activities was removed and incorporated into other existing classifications. Mech notes this proved a significant challenge that required considerable effort by ALA's Standards Review Committee, the group of industry professionals tasked with overseeing the UPBMS, but the result makes for a more intuitive structure.
- **Enhanced Classification for Senior Leadership:** The Leadership and Management Classification was significantly revised. "Our previous version had only lightly reflected many of the activities performed by senior leadership," says Mech. "While there remains work to be done, this section has been significantly improved."

"If business partners can embrace these standards, integrating them into their solutions and reporting around them, we can help drive the initiative forward."

It's not just legal management professionals seeing the benefits of the UPBMS. Eric Wangler, President of BigHand North America, has more than 20 years' experience on the business partner side of the legal industry and also sits on the Standards Review Committee. "I have consistently heard from law firm clients that they are looking for the ability to benchmark their results to their peers in the industry. The challenge has always been getting to a position where you can have universally accepted standards governing the data to make this type of benchmarking accurate and meaningful," says Wangler. "The industry has evolved to a much better place with regard to legal billing standards, but there remains a tremendous gap regarding back-office services. If business partners can embrace these standards, integrating them into their solutions and reporting around them, we can help drive the initiative forward."

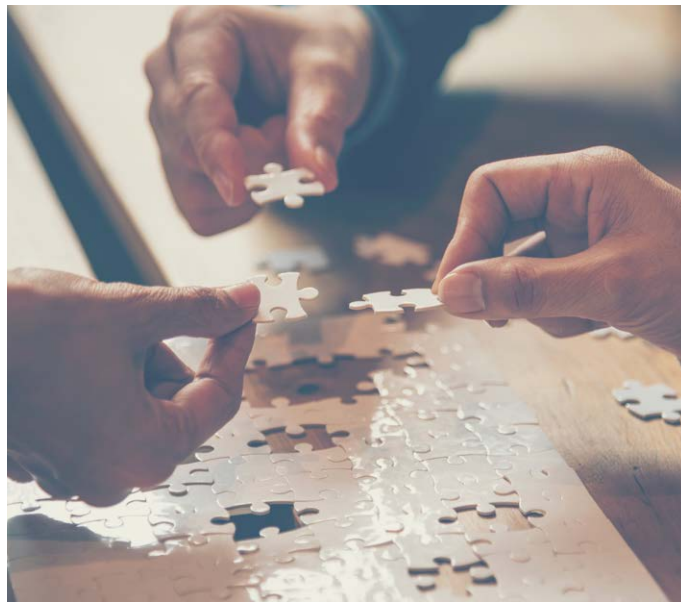
That's what the UPBMS aims to do — provide that standard framework for legal operations to offer, implement and maintain successful management and operational strategies,

"Our previous version had only lightly reflected many of the activities performed by senior leadership. While there remains work to be done, this section has been significantly improved."

while encouraging the use of a common language and approach to legal support operations across the industry. It will more accurately capture the costs associated with matters, so firms can better understand the true costs associated with delivering their services.

WHAT THIS MEANS

Mech is pleased with the initial rollout. As the first effort to develop a standard for support activities, the UPBMS has received a positive response from the industry, he says. "Because it is still a very new effort, law firms and legal administrators are learning how to use the code set to support administrative initiatives," says Mech. He says after the release of Version 2.0, the Committee will focus on educational and promotional efforts to increase adoption.



He also looks forward to it being adopted for more uses. Job descriptions are a natural fit for the UPBMS, because it standardizes headings and definitions that legal management professionals can adapt to their firm's format. Mech says that there are even more impactful uses to be had, including using the UPBMS to perform job analysis and similar activities such as monitoring key performance indicators (KPIs) and other performance metrics.

From the business partner side, Wangler says he sees implementation picking up quickly. "We are seeing more and more interest from clients as they seek better data to manage their back-office businesses, to get to a standardized view. Now that the codes have been locked down in Version 2.0, I think this will move forward quickly."

Plus, it just makes good business sense. "I think the implications and opportunities are significant," Wangler says. "Naturally, from a commercial standpoint, it stands to reason business partners can gain competitive advantage by being part of the solution." ■

ABOUT THE AUTHOR

Valerie A. Danner is the Senior Managing Editor of *Legal Management*. She has a bachelor's in journalism and has been writing and editing for various publications for nearly 20 years.



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WE WANT YOUR FEEDBACK

The comment period for version 2.0 of the UPBMS will open on April 11. We'd love to hear from you! Just visit <https://upbms.alanet.org/net.org/> to send us your thoughts.



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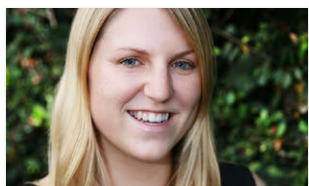
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Run a Regular Check on Mental Health

Statistics reveal many employees are struggling with depression. Do you know how to identify and address it?



KYLIE ORA LOBELL
Freelance Writer

There is much discussion about the mental health of lawyers and the toll stress has on their lives. It's true — depression does hit legal particularly hard. Lawyers are 3.6 times more likely to be depressed as employees in other jobs, and 28 percent of licensed and employed lawyers have depression.

But these issues do not just affect attorneys. In fact, depression has had a major effect on America's workplaces, leading to a decrease in attendance and productivity, and an increase in costs passed onto employers.

One study revealed that depression was the most expensive health condition in the workplace, and another study showed that depressed employees lose an average of 27 workdays per year. While this mental health issue is widely prevalent among employees, it is often not talked about, and employees struggle with it on their own.

"I am hopeful that in the next 5, 10, 15 years we will see a real sea change in how people view, discuss and tackle mental health conditions."

"Most depressed employees will never admit to their managers that they are depressed," says David Reischer, Human Resources Manager at LegalAdvice.com. "A large part of the reason for their silence is due to the stigma many employees experience around mental illness."

HOW DEPRESSION MANIFESTS IN THE WORKPLACE

Depressed workers will stay silent about their mental health issues and keep to themselves in general. This behavior hinders teambuilding and productive idea generation.

"A person [with] depression doesn't feel like talking much and tends to be in [his or her] shell," says Siddhartha Gupta, Chief Executive Officer of Mercer-Mettl. "[He or she doesn't] feel the need for participating in group activities or coming up with new ideas. This has a major effect on team activities, collaboration, brainstorming and discussion of important strategies."

When employees aren't getting the help they need, and suffer with their depression, they can sometimes lash out at coworkers and cause problems around the office. Workplace abuse may escalate because the depressed person might have less patience, won't filter out his or her word choices and will become irritable, says Shannon Thomas, a Licensed Clinical Social Worker. "The combination of job demands and depression can — and often will — lead to an increase in workplace abusive behaviors."

"The combination of job demands and depression can — and often will — lead to an increase in workplace abusive behaviors."

Michael Moore, JD, a professional coach who specializes in helping lawyers and law firms at his company Moore's Law will be presenting on creating a healthy work environment at ALA's 2019 Annual Conference & Expo. He says when it comes to lawyers, the tremendous pressures can make them fall down mentally or physically. "That can cause them to self-medicate using food or alcohol or drugs. A lot of times

we see good old-fashioned frustration and anger over relatively trivial or mundane matters. You end up with a toxic environment where people don't know why an individual is reacting this way."

Though depression is a touchy subject, employers need to address it. Otherwise, depressed workers might never receive the help they need. Plus, they may have a destructive impact on the rest of the firm, causing other employees to lose focus or feel uncomfortable.

DEALING WITH DEPRESSION IN FIRMS

Combatting depression in the workplace starts with acknowledging that it exists. According to Moore, a frequent law firm response to depression is for workers to tough it out. "We need to realize we have a problem and be open enough to discuss the situation," he says.

Moore suggested setting up wellness programs, which may mean sponsoring gym memberships, employee participation in marathons and fun "firm events that illustrate that there is another side to life than work."

Gupta says that putting a simple stress management strategy into place, like a 15-minute morning motivation, would help all employees. He suggests that in the morning, leaders give everyone 15 minutes to do something they love, whether it's watching funny videos, listening to their favorite songs, meditating or dancing. "This activity sets the routine and higher motivation levels for the rest of the day."

It's also critical for companies not to force activities on their employees. Gupta recommends surveying employees on the kinds of activities they would enjoy. "It could be anything off-site, parties, meditation, [the] gym, sports activities — anything that releases happy hormones like endorphins and serotonin, and reduces the level of stress hormones. Test what works for different individuals."

According to Reischer, it's also a good idea to have yearly discussions with employees about how they are doing. "A company should have regular mental health reviews with

"A company should have regular mental health reviews with their employees to discuss work life and things that the organization can do to improve mental health."

their employees to discuss work life and things that the organization can do to improve mental health," he says. "This type of intervention could occur on an annual checkup basis."

Once mental health reviews are conducted, the leadership can figure out the appropriate ways to guide employees to seek help. "Companies that consult with local mental health professionals are best suited to provide resources that can be quickly accessed by employees struggling with depression," says Thomas.

But the acknowledgment of depression can't just come from leaders. It also has to come from the individuals who are suffering from it in order for a resolution to be found.

Mark Goldstein, Counsel, Reed Smith LLP New York, says he realized he was depressed when he had unexpected panic attacks, irrational fears, the inability to focus or perform even basic tasks and an incapability of engaging in normal social interactions with family members, friends and colleagues.

He says that what's going to make a difference to depressed individuals and leadership is the de-stigmatizing of mental health disorders, so depression is no longer a dirty word. "Disseminate information to employees — through in-person educational sessions, electronic means and other mechanisms

— on the benefits of health, wellness and mindfulness. Encourage employees to come forward if they are suffering."

Though depressed employees may still feel shame around their disorder, and be afraid to reveal it in the workplace, Goldstein is optimistic that that will change with some progressive reform.

"I am extremely heartened by the recent state of discourse on this issue," he says. "I am hopeful that in the next 5, 10, 15 years we will see a real sea change in how people view, discuss and tackle mental health conditions. I am hopeful that people will be more open about asking for help. I am hopeful that the 2020s are the decade of mental health destigmatization." ■

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*.



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ROSS FISHMAN, JD
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What's a Logo and Why Do We Need a Good One?

Logos are hard — really hard. Surprisingly hard. There's a lot more to organizing the way your law firm name looks on your business card than most people think. Consider how easily we can remember the typefaces used by Coca-Cola, Disney, IBM, FedEx or NASA — or Target's unique circle's or Nike's swoosh.

“

Logo design is much more difficult than many people realize. And in some ways, it's more important, too. Why? Because an amateurish logo is *your entire firm* wearing a cheap suit.”

A logo is one of many tools that helps firms convey their message to the marketplace. While it can seem insignificant, a logo is often the first contact many prospects will have with your firm — for example, on a business card when meeting one of your lawyers at a conference. It can help set the tone for how they view your firm and its quality and professionalism. Does it look professionally designed? Does it convey the sense of a high-quality organization?

I want your logo to highlight the information that helps viewers read and remember the firm, to help them find you later. We've redesigned more than 100 law firm logos over the years, most commonly as part of a larger firm rebrand. We always start with a process to discover the brand message the firm wants to convey to the marketplace. Has your firm first decided what its message is? Are you tough or friendly? Creative or traditional? Efficient, intellectual, tech-savvy or edgy? Because once you know specifically what you're saying, that is the vital guidance to offer to a qualified designer.

Logo design is a narrow subspecialty area of design. Not every graphic designer can create great logos, just like not every lawyer can handle every kind of legal practice. Many great logo designers do little else, spending their entire lives exclusively designing logos. That's it. They live in the world of glyphs and font families.

A logo is a little piece of art, and your lawyers and professionals can have very different feelings about the type of artwork they like. Some like impressionists or



modern art; others might prefer “dogs playing poker on velvet.” They’re entitled to their own opinions, of course, and we must help them see why the logo says something about the firm that should make them proud to pull it out of their wallet. Because if they don’t like the color or design, you’re going to hear about it for a very long time. Some lawyers will simply refuse to hand out their cards — trust me, this happens. Logo design is much more difficult than many people realize. And in some ways, it’s more important, too. Why? Because an amateurish logo is *your entire firm* wearing a cheap suit.

Maybe no one ever hired or fired a law firm because of its logo, but it’s sitting prominently on your business card and website. It’s one of the first things people experience about your firm at a critical time, when they’re looking for any indicia of quality (or lack thereof). It’s an important part of a first impression.

It’s understandable that people think logos are easy to design — they’re just words after all. Pick one or two different standard Word fonts, bold or italicize part of the name, center it, then add a color. Boom — you’re done!

It seems simple, but it’s not. Well-designed logos are eye-catching, balanced and nuanced and a good designer juggles many different variables like, shape, balance and utility. Consider the capitalization style, centered or offset, thick or thin, serif or sans serif, two lines or three.

Don’t settle. In a high-risk legal profession where the buyer can’t “try on” the service or take it for a test drive before buying, even little things matter. You wouldn’t wear a cheap suit to meet with a hot new prospect. Don’t let a mediocre logo or business card act like it.

Done right, logo revisions require strategic thinking to clearly determine what the firm wants to say to its target audience(s), and how to connect with them. It can be a long process, but it’s well worth the investment. ■

ABOUT THE AUTHOR

Ross Fishman, JD, specializes in branding, websites and marketing training for law firms. A former litigator, marketing director and marketing partner, he has helped hundreds of firms dominate their markets. Fishman was the first inductee into the Legal Marketing Association’s Hall of Fame. He’s written two books on branding and associate marketing, both available on Amazon.



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What makes CES so exciting for us is seeing the explosion of new consumer products that take advantage of advancing technology to improve our daily lives in and out of the office.”

Our Take on the Consumer Electronics Show 2019

As we write, we are about 30,000 feet above the Grand Canyon. That's right, we are returning from our annual trek out to Las Vegas for the biggest technology show in the world, the Consumer Electronics Show (CES). The show takes over the Las Vegas Convention Center and much of the Strip — as geeks, like us, converge in the desert to ooh and ahh over bleeding-edge technology that is trying to break into the mainstream.

The scope of this show is so massive that it is impossible to see everything, even if you stay for all four days of the mega event. This year's show had more than 180,000 in attendance and more than 4,400 companies exhibiting in 2.7 million net square feet of exhibit space. We packed our tennis shoes, extra vitamins, and Advil and plunged into the sea of geeks that swarmed Vegas.

If we had to sum up our overall impressions from the show after countless hours on the exhibit floor and thousands of steps on our Fitbit watches, we would say that the following technologies look to be the most exciting, promising and impactful for the future: 5G, autonomous driving vehicles, artificial intelligence (AI) and robotics, flexible screens and TVs, gaming (we are not interested), and a massive proliferation of smart devices (most powered by Alexa) for everyday use.

TALKING 5G

5G is the buzzword du jour at CES and everywhere else in tech world these days. So what is 5G? Well, if you have heard of 4G (which is probably what your smartphone is operating on right now), 5G is about 10 to 20 times faster. 5G stands for “fifth-generation wireless” and represents a new standard for sending and receiving data over cellular networks.

All the major cellular carriers are building out their 5G networks in 2019, and consumers are already beginning to see a few 5G-compatible smartphones being advertised. (Unfortunately,

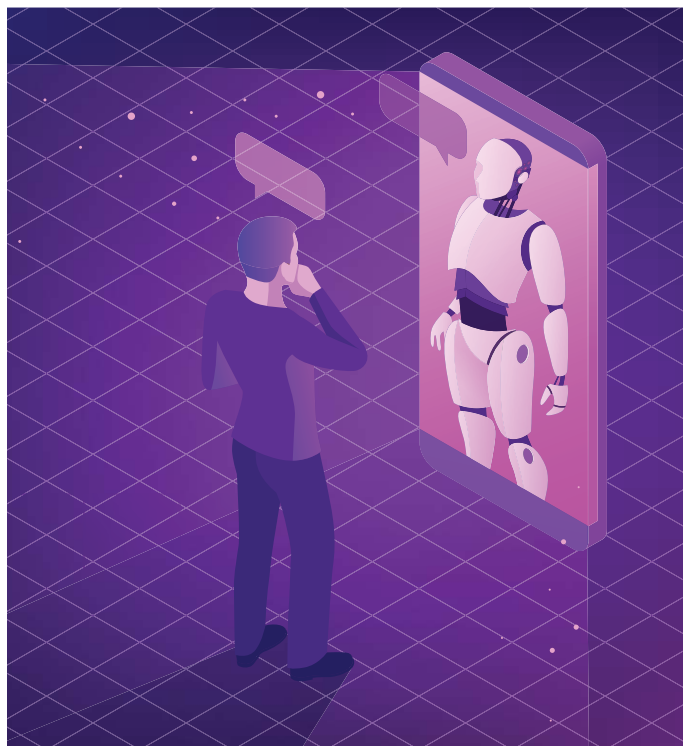
your shiny new iPhone XS, and other new phones you may have purchased recently, will not be compatible with the new 5G network when it comes online.)

So leaving the technical details behind, what does 5G mean for consumers? Industry leaders tell us that, with its greatly increased transmission speeds and low latency, 5G communication will enable users to download a full-length HD movie in mere seconds, enable doctors to perform remote surgeries, and finally make self-driving cars a reality. One can only imagine other applications that will explode as 5G moves into the mainstream in 2019 and 2020.

AI: MAKING LIFE EASIER

We jokingly remark that we are pioneers in the field of “artificial intelligence” as we have been “artificially intelligent” for years. (That is, our intelligence is only artificial.) But AI is no joke and is making a mark in all kinds of consumer products from cars to shoes.

We saw smart suitcases that “magically” follow their owners, and crowd detection camera systems that analyzed our faces in a huge crowd and deduced certain personal characteristics, such as gender, age and weight. We saw robot butlers that can converse with a hotel guest as effortlessly as a human (or maybe more so) and smart walkers that use AI and technology to enable the elderly and disabled to live more independent lives.



CHANGING OUR VIEW OF TVS

The TVs we see at CES always make us drool. This year’s array was no different as the major TV manufacturers showcased their massive 8K displays that looked so realistic you wanted to just walk into the scene they were displaying on the screen.

But probably the most impressive TV we saw was LG’s 65-inch OLED roll-up TV. That’s right — this flexible TV rolls up completely out of sight in its base when not in use. It magically rises from the base when turned on and is wafer thin. This amazing TV is like none we’ve ever seen before, and we’re told it will be coming to retail shelves sometime in mid-2019.

AMAZING NEW TECHNOLOGY

What makes CES so exciting for us is seeing the explosion of new consumer products that take advantage of advancing technology to improve our daily lives in and out of the office. One of the most enjoyable sections of the show is an area known as Eureka Park where startup companies from around the world display their brand-new tech products trying to gain consumer acceptance. Here we saw a devices that in every category imaginable.

There was a “smart backpack” that charged your phone, acted as a global MiFi, had a rear-facing camera, a GPS-location tracker and much more. There was a smart desk that connected everything with only one cable, had three monitors, and had a computer that could be controlled simply by hand gestures. There were drones for every imaginable application, turntables that connected to speakers wirelessly, a plethora of gadgets for pet care, health-monitoring devices designed specifically for the elderly, and so, so much more. Some of the items were so outrageous they made us laugh. Others made us want to buy the prototype immediately.

In our opinion, CES 2019 introduced and showcased more innovative and creative inventions than those on display in years at the annual geekfest. We were impressed and excited. We will discuss some of the items we saw in future articles. ■

ABOUT THE AUTHOR

William Ramsey, Partner at Neal & Harwell, and **Phil Hampton**, Consulting President of LogicForce, are best known for *The Bill and Phil Show*.



www.twitter.com/BillandPhil

Annual Conference Exhibitors

Heading to Grapevine, Texas, for ALA's Annual Conference & Expo? Be sure to stop by the Exhibit Hall find solutions to your firm's challenges. Here's a list of all the business partners who will be on-site. To get the most up-to-date listing, be sure to visit the [ALA 2019 Annual Conference Exhibitor List & Floorplan](#).

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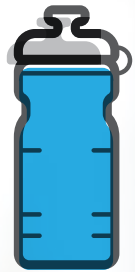
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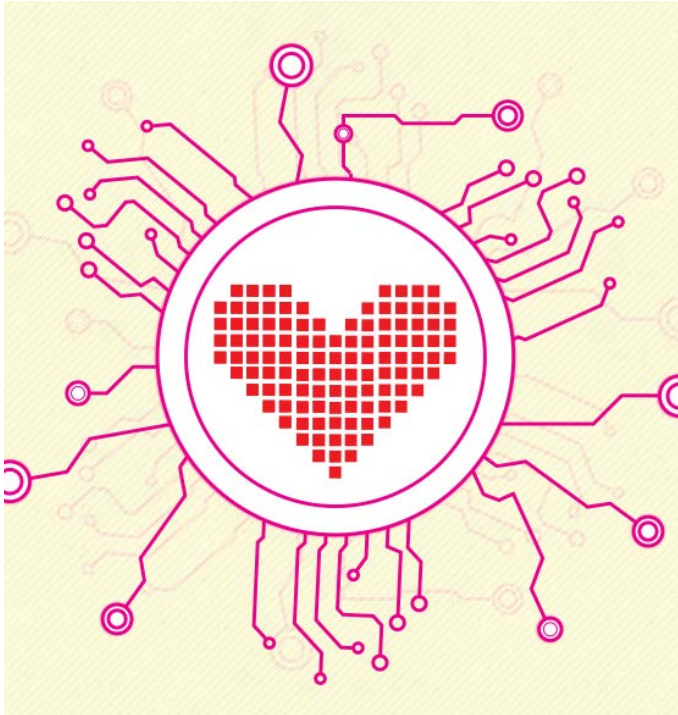


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User Adoption: Feeling the Love for Your New Tech

By Jody Cosgrove



If a law firm buys best-in-class new technology and no one at the firm uses it, then it's money down the drain.

Sure, when you phrase it like that, it's a no-brainer. But we rarely look so bluntly at user adoption. That's why I'm glad to see a discussion — in *The American Lawyer* and in the International Legal Technology Association (ILTA)'s 2018 Technology Survey — about user adoption. I agree that choosing software to solve real pain points is key to improving adoption of that technology.

I just don't know that it's the complete answer. We tend to assume that the hard part about technology upgrades is done once we've decided which software to purchase and implement, but that might be when the true challenge begins.

WHAT DOES IT TAKE TO ADOPT TECHNOLOGY?

Serious question: What does it take to get people to use technology?

- 1. They should know about it.** This should be obvious, but it's sometimes overlooked. After all, if no one knows you have a product that helps proofread documents, no one is going to use it.
- 2. They need to think about it at the right time.** (Like how you only think about buying batteries when you try to use the dead TV remote, not when you're in the store walking past a battery display.)
- 3. There needs to be a value in using the technology** — and “because my boss said so” isn't always good enough in the moment. Some law firms have gamified adoption of new technology, playing off people's natural competitiveness to raise awareness and encourage use. According to the ILTA survey, this approach is more common with large firms: While only 7 percent of firms overall used gamification to improve user adoption, the number rose to 15 percent for those firms with 350-699 attorneys and to 35 percent for firms with more than 700 attorneys.
- 4. They must know how to use the technology and should be comfortable with it.** That also means that the new tool shouldn't throw off the rest of their workflow. Some tools are just hard to master — people end up feeling like they must continually start from scratch, relearning the system each time they use it. If a system is slow to start or frequently requires a call to IT, it's going to interrupt rather than streamline their work. Simply put, people are not going to use technology that slows them down.

WHEN IT'S JUST NOT WORKING

Let's take a moment here to dispel one logical problem: the sunk-cost fallacy. If you've already invested in a system — particularly a pricey one — you may be tempted to double down on it and try to force user adoption. You know it's great, right? All the reviews said so. Plus, look how expensive it was!

We tend to assume that the hard part about technology upgrades is done once we've decided which software to purchase and implement, but that might be when the true challenge begins.

But if your people don't use your technology, I hate to tell you, it's not great *for you*. It might not solve any of your pain points, or it might be inconvenient to use, or it might not fit within your existing workflows. Unless the benefits of technology substantially outweigh any costs of using it, adoption will be sluggish at best. Don't try to rearrange your whole process to incorporate a tool that's not a good fit.

THE IMPORTANCE OF INTEGRATING USABLE, USEFUL TOOLS IN EXISTING WORKFLOWS

If you're buying new tech, don't expect that your work will be done when you sign on the dotted line. Don't even expect to be finished when the install is complete. Think ahead about how the business will use the new system in day-to-day work.

Consider finding systems that are integrated with programs or workflows you already use. Ideally, you want to find a tool that's available exactly when and where you need it that can be implemented seamlessly. It should also provide a significant benefit, not just to the firm overall, but directly to the user. Tools that clearly save time and catch user errors increase the likelihood that people will use them again.

No matter how exciting a tool's demo is, make sure it is easy to use when you don't have a salesperson or tech support assistant sitting beside you. Provide training and resources so that your team knows about the tech and knows how to use it without hand-holding. Having a process for implementation

and project planning will ensure that the team engages with new solutions.


Don't waste money on technology that no one is going to use. Choose wisely and roll out your implementation carefully — then watch your user adoption rates soar. ■

ABOUT THE AUTHOR



Jody Cosgrove is the Vice President of Customer Success at Litera Microsystems. She is responsible for driving customer success activities and outcomes and overseeing the company's annual recurring revenue business and adoption team. She is one of the founding members of the Midwest Legal Technology Group, a peer-to-peer networking group, and a longtime participant in the International Legal Technology Association (ILTA).

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Building Better Business Partner Relationships

By Katie Bryant, CLM



As the legal industry changes, competition is increasing. Your organization's competitive advantage must not only talk the talk but also walk the walk. As a legal management professional, your role in that process often depends on the business partners you choose to do business with. The right business partners can help you run a smooth operation and increase your profits; the wrong business partners can harm your organization's success.

The Exhibit Hall at ALA's Annual Conference & Expo is probably one of the best resources for sourcing these important relationships. ALA's business partners are experts in their fields with a wealth of knowledge to share with our members. As you navigate the Exhibit Hall and decide who will make it to the next stage of your selection process, here are some things to keep in mind.

- 1. Prepare:** Before the conference, get your employees' perspectives on any work issues you've noticed — how they came about, what they see as a positive solution. Solicit the opinions of people you trust in different roles, as each person has a different viewpoint about their interaction with hardware, software, people and problems. These conversations will ensure you have the information you need to speak with business partners in the Exhibit Hall.
- 2. Price:** You may want the lowest price, but remember that if your business partner cannot make a reasonable margin on your business, then something is going to suffer. And if the business partner doesn't cut somewhere, they may find out too late and put the entire business at risk. That's risky for you if you don't have a backup.
- 3. Service:** Does the business partner only emphasize price, cost savings and/or technological bells and whistles, making little or no mention of customer service? Do they reference any customer service employees by name as an example of their great service? Keep these questions in mind. Time and time again, clients rate service and quality as their top priorities. If a business partner isn't emphasizing customer service, that's a red flag — they're likely focused on the short game (a quick sale) rather than a long-term partnership with your organization.
- 4. Quality:** Is the business partner focused on improving their products, services, systems and processes? Are they constantly pursuing excellence or are they resistant to change? Are they committed to understanding their clients' needs and then meeting those needs — or even better, exceeding expectations — both now and in the future?
- 5. Recommendations:** Many business partners will have a list of happy customers for you to contact at the ready. But their list is biased. Thankfully, as an Annual Conference attendee, you have instant access to peers with different opinions on the quality of the business partner. Keep your eyes and ears

Before the conference, get your employees' perspectives on any work issues you've noticed — how they came about, what they see as a positive solution.

open — network during lunch, beverage breaks and social events, and look for roundtable discussions related to your areas of need.

Once Annual Conference has concluded and you get back to the office, your selection process for business partners will continue. Consistency is key. Be sure to ask the same questions and require the same information from each business partner you consider. The following is a list of information you should collect as you do due diligence when selecting a product or service provider.

- 1. Interview potential business partners.** Ask trusted partners or employees to sit in on initial phone calls and meetings to point out any blind spots you may have. Often, your office management staff or paralegals most frequently deal with business partners. It's important to have buy-in from them and other influencers before you commit to a new business partner relationship. Consider these topics:
 - a. Is the business partner willing to invest in frequent research to best align products and services with your organization's changing needs? Do they think creatively to help your organization become more effective? A business partner needs to be aligned with your long-term interests.
 - b. Ask about the financial solvency of the business partner. If they are willing to give you a copy of their latest financial statements, even better. There are dozens of stories about companies that abruptly close their doors, leaving their clients without a vital service or product.
 - c. Ask about their company history. Get bios of management and key personnel.
 - d. Discuss their ability to deliver expected levels of service and the personnel and tools they have in place.
 - e. Does the company have a data breach policy? Do they have data privacy policies and/or conduct training for employees with access to your data?

- 2. Interview references.** Develop a list of questions to ask of each reference so you will have a comprehensive data pool and a truer idea of the quality of the business partner. The more references you can find, the better off you will be.

- 3. Tour the business partner's facility if possible.**

- 4. Research complaint history.** If you find something troubling in online reviews or elsewhere, ask questions.

- 5. Verify the business partner's insurance.** Ensure they carry adequate limits.

- 6. Obtain a current copy of their business license or official business certification from their local jurisdiction.**

- 7. Review the contract.** Are the terms, renewal/notification requirements, required service levels, etc. agreeable to you and your organization?

Due diligence will vary, and you will need to decide what is reasonable for your organization. One way of being reasonable is to conduct due diligence proportionate to the business partner's perceived risk. The greater the risk, the more diligence should be conducted. Additionally, it's not enough to perform diligence only during the initial vetting period. Remaining diligent throughout the relationship, especially with your critical business partners, is necessary to avoid getting blindsided down the road. ■

ABOUT THE AUTHOR



Katie Bryant, CLM, serves as the Chair of ALA's Business Partner Relations Project Team. She is the Executive Director of Udall Shumway PLC in Mesa, Arizona.



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Anniversaries, Awards and Appointments

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Paul R. Boken, a member of the Greater Cincinnati Chapter, is now Chief Operating Officer at Dykema Gossett, PLLC, in Chicago, Illinois.

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Lisa R. Ford, a member of the Greater Los Angeles Chapter, is now Office Manager at Holland & Knight LLP in Los Angeles, California.

Scott J. Jaffee, CPA, CGMA, a member of the New York City Chapter, is now Firm Administrator at Cohen Clair Lans Greifer Thorpe & Rottenstreich LLP in Westfield, New Jersey.

Mark J. Johnston, a member of the Greater Los Angeles Chapter, is now Director of Human Resources at Zuber Lawler & Del Duca LLP in Los Angeles, California.

Deborah A. Kuchta, CLM, a member of the Greater Chicago Chapter, is now Firm Administrator at Brennan Burtker LLC in Chicago, Illinois.

George Leloudis, CLM, CPA, a member of the Raleigh-Durham Chapter, is now Executive Director of Morningstar Law Group in Raleigh, North Carolina.

Hannah K. Lincecum, a member of the Golden Gate Chapter, is now Human Resources Manager at Kirkland & Ellis, LLP, in San Francisco, California.

Abbie J. Lira, a member of the Nebraska Chapter, is now Director of Operations at the Law Office of Matthew A. Lathrop, PC, LLO, in Omaha, Nebraska.

Damaris "Dee" Marriaga, a member of the Atlanta Chapter, is now Office Manager at Squire Patton Boggs (US) LLP in Atlanta, Georgia.

Dea McCart, a member of the Austin Chapter, is now Firm Administrator at Sneed Vine & Perry, PC, in Austin, Texas.

Heather A. McConnell, CLM, MBA, SHRM-CP, a member of the Houston Chapter, is now Executive Director of Romano & Sumner in Sugar Land, Texas.

Wayne A. Schertler, a member of the Minnesota Chapter, is now Chief Operating Officer at Larkin Hoffman in Minneapolis, Minnesota.

Gregory Taylor (not pictured), a member of the Greater Los Angeles Chapter, is now Office Administrator at Akerman LLP in Los Angeles, California.

William K. Weech, a member of the Greater Los Angeles Chapter, is now Executive Director of Colantuono Highsmith & Whatley, PC, in Pasadena, California.

Sending Our Heartfelt Condolences



- As detailed in the Executive Director Oliver Yandle's letter earlier in this issue, ALA Past President Steven D. Wingert, CLM, passed away in March from pancreatic cancer. He will be dearly missed by his colleagues at ALA and his past workplaces, including the most recent, the Lowndes firm in Orlando, Florida; his family, including husband Mark Bridgeman, CLM, a fellow ALA member; and his friends. Donations in his memory can be made to the Pancreatic Cancer Action Network (<https://bit.ly/2lbFeLM>). The ALA page has already raised more than \$8,000 for research and advocacy. Look for a look back at Steve's legacy in our May issue.
- Longtime member Suzanne M. Homel passed away at the age of 65 in March. She ended her 32-year career at Fox Rothschild LLP in Philadelphia, Pennsylvania, as the Senior Director of Administrative Services, and she first joined ALA in 1992. Donations may be made to Philadelphia's Little Flower High School in Suzanne's honor. Our thoughts are those who knew and loved her.
- The Greater Los Angeles Chapter informed ALA headquarters that their 2009-2010 President, Robert F. Santos, passed away at the age of 44. He was Director of Administration at Manning & Kass Ellrod Ramirez Trester LLP in Los Angeles, California. His family, friends and colleagues will be in our thoughts.



GET YOUR EDUCATION ONLINE

ALA's 2019 education schedule features more than 40 webinars — many from top-rated conference speakers — in addition to a continually updating archive of on-demand webinars. Earn continuing education credits and discover the latest tools and best practices in legal management.

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MAY 7



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What's Happening at Headquarters?

ANNUAL CONFERENCE & EXPO PREVIEW

ALA headquarters' staff is packing up and heading to the Lone Star State for the 2019 Annual Conference & Expo, happening April 14–17. We hope to see you in Grapevine, Texas, too — you can still register online, but if you miss the cutoff, come and sign up on-site for one, two or all four days! We have a lot to look forward to, including:



Education: More than 70 sessions from 75-plus expert speakers are spread over the conference's four days, which means you can net more than 15 continuing education hours if you fill every one of your slots. Use the ALA Events mobile app to choose the sessions you're most interested in, create a schedule and download handouts. Remember to check out this year's all-new education tracks, which cover some of the hottest legal industry topics: the Association of Legal Technologists (ALT) Track, the Cybersecurity Track, and the Profitability, Partner Compensation and Pricing (P3) Track.

Networking: Attendees will have the opportunity to connect and renew relationships with colleagues and business partners throughout the conference, especially as they tour the Exhibit Hall during the Welcome Reception, the Networking Reception and various lunches, coffee breaks and dessert breaks. They will also find peers at Idea Exchanges and the Recharge Lounges — in one, there will be a headshot photographer and LinkedIn consultations; in the other, a Wellness Lab will teach stress and energy management skills.

Events: In addition to the Exhibit Hall events, the conference features the Association Lunch, a town hall about the current state and the future of ALA; the Silent Auction, which raises money for the Foundation of ALA; the Association Awards Gala, a seated dinner; and the VIP Grand Finale, a send-off party. The final event will be held at the resort's newly renovated Glass Cactus Nightclub and feature a Texas-style "Denim and Diamonds" theme.

Recreation: The Gaylord Texan Resort & Convention Center has virtually everything you might need — restaurants, bars, pools, shops and a gym — but if you want to venture off-campus, the city of Grapevine offers eateries, wineries, breweries and shopping, as well as outdoor activities at Lake Grapevine. Fort Worth and Dallas are a mere 30 minutes away by car, so it's easy to check out the Fort Worth Stockyards or, if you arrive early, the Main Street Fort Worth Arts Festival (April 11–14).

Visit alanet.org/conf19 for all the details!



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FALL CONFERENCE REGISTRATION OPENS NEXT MONTH

Look forward to “Registration is open!” notifications in May for the following events:

- Chapter Leadership Institute | July 25–27 in Louisville, Kentucky
- Large Firm Principal Administrators Retreat | August 1–3 in Nashville, Tennessee
- C4: The Legal Industry Conference | September 18–20 in Boston, Massachusetts
- Intellectual Property Conference for Legal Management Professionals | September 26–27 in Washington, D.C.
- ALA Master Class: Leadership for Legal Management Professionals | October 21–23 in Seattle, Washington

We'll also be hosting two mini-conferences that you can package with the larger events or attend separately. The Legal Lean Sigma® and Project Management Yellow Belt Certification Course happens September 17–18 in Boston *before* C4: The Legal Industry™ Conference, and Advanced Human Resources Administration for Legal Management Professionals happens October 21 *before* the ALA Master Class.

APPLY TO THE SUSAN L. FRENCH EMERGING LEADER FELLOWSHIP PROGRAM

The Foundation of the Association of Legal Administrators has revamped this program! The one-year fellowship program provides a full scholarship to ALA's 2019 Chapter Leadership Institute and enrollment in the interactive online series, Elevate Your Professional Presence — plus a bonus presentation module from Judy Hissong, CLM, President of Nesso Strategies, Inc.

These opportunities include expectations of full engagement and participation by the fellowship recipient. If all program requirements are met, a complimentary registration and travel stipend to ALA's 2020 Annual Conference & Expo may be extended to recipients. Find full details of this fellowship program are available at alanet.org/french-fellowship. Applications are due May 13.