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TRENDING RESOURCES: 8 PROGRESSIVE HR PRACTICES FOR THE MODERN LAW FIRM

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The Trend to Put Employees' Interests First

When I was starting my career, I remember my main focus was just wanting to find a place to work. Work perks, so to speak, were not at the forefront of my mind. But that's something that's shifting.

“

These are just some examples of what firms are doing to attract and keep their talent. And such benefits are increasingly no longer optional for firms that wish to remain competitive.”

As firm managers, we often hear a lot about innovation. It's no secret that to attract and maintain the best lawyers and staff, firms need to innovate — it's no longer one-size-fits-all when it comes to things like training, reviews and benefits.

In this month's cover story, "Trending Resources: 8 Progressive HR Practices for the Modern Law Firm," writer and attorney Mary Kate Sheridan explores some of the movements within the legal industry to help firms compete for top talent. While work-life balance is cited as priority for many, firms are looking beyond that and getting creative.

For example, Pillsbury Winthrop Shaw Pittman LLP offers in-house career coaching where employees can confidentially discuss their career trajectory. Winston & Strawn LLP takes a holistic approach that includes a development framework based on established core competencies. They also offer a gender-neutral parental leave program that provides a transition period for when parents return to work.

And it's not just for lawyers. Pillsbury's own gender-neutral parental leave program is also role-neutral and open to all employees. Meanwhile, Baker McKenzie offers training tools for non-attorneys in a variety of areas, including leadership and writing skills; they publish a regular newsletter that keeps staff apprised of available opportunities.

You don't have to be a large firm to make progressive changes happen. For example, Clark Partington, where I work, has formed an employee-central Communications and Engagement Team that finds innovative ways to connect and involve all employees in firm activities.

Blalock Walters is a medium-sized firm with two offices in Florida. They've branded their initiative the BeWell Program, and it focuses on five areas of employee well-being: community, social, career, financial and physical. The program's mission is to encourage employees' personal and professional productivity and physical and mental well-being by fostering a worksite culture that supports anyone's voluntary desire to make healthy lifestyle choices.

These are just some examples of what firms are doing to attract and keep their talent. And such benefits are increasingly no longer optional for firms that wish to remain competitive. Plus, it's not just employees who benefit from a more flexible, forward-thinking work environment. Research continues to show that these arrangements make

for happier, healthier employees who are less likely to be searching for a new job.

So I invite you to read more about what some firms are doing in this area, and then ask yourself if any of these policies can be adopted in your offices. The profession is changing, and this is one way that we can keep up. ■



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5 Top Misconceptions About Information Security and Compliance

“Cyber risk management is an executive or administrative responsibility, not an IT problem.”

Cyberattacks and data breaches have become commonplace and pose a significant risk to law firms of all sizes. Yet most firms have not taken all the necessary measures to implement a proper information security plan and to comply with federal, state and industry standards for protecting client data.

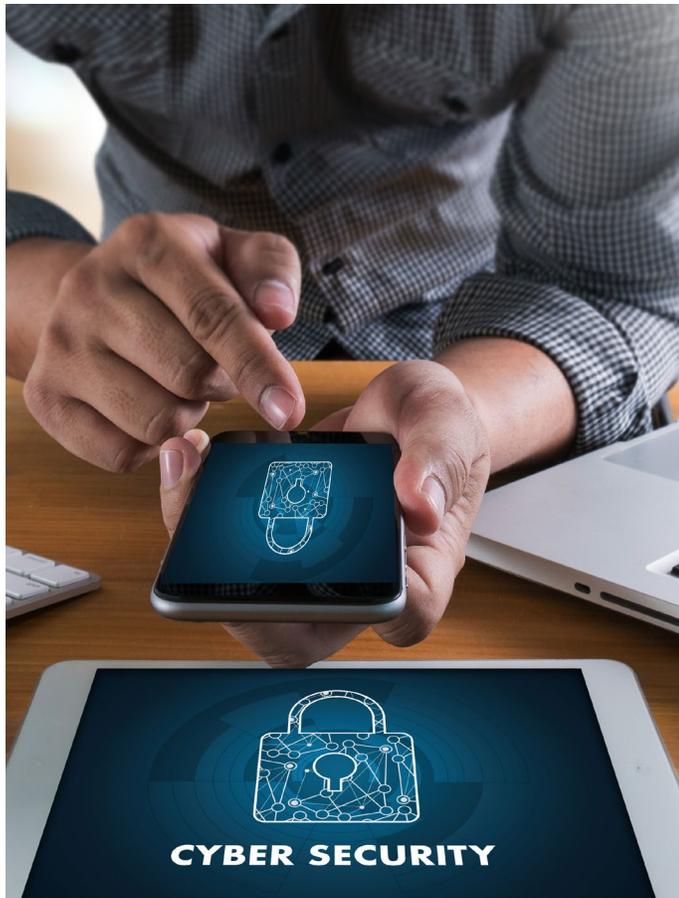
Here are five common misconceptions that may be holding your firm back from taking the necessary steps to properly manage data-breach risks and protect the firm and its clients.

Information security is an IT issue. There are roughly 10 categories of information security best practices and compliance that affect virtually every part of a business, including less-discussed areas such as human resources, physical facilities, vendor risk management and breach response. To be clear, IT has a vitally important role to play in preventing a breach, but if your information security plan does not include all the other best practices, your business is not only out of compliance but also at high risk of suffering a data breach. Cyber risk management is an executive or administrative responsibility, not an IT problem.

Hackers are the biggest threat. According to several recent studies, you have a greater risk of suffering a data breach due to employee error and insider theft than being directly attacked by a hacker. Without a robust employee training program to help keep everyone on their toes, employees can fall for fake emails and phone calls or use their mobile devices insecurely, giving access to your network and data or locking up your systems with ransomware. While hackers are a major threat, they'll more often use your attorneys and staff to breach your firm and get access to confidential data.

We have a plan in place, so we are prepared. Your information security and compliance plan is only as good as its execution and your ability to keep it current. When was the last time you updated your policies and practices, reviewed your security agreements for vendors and business associates, or updated your employee training program? Data security best practices, client expectations and regulatory requirements are constantly changing. If it's been a while since you've done a formal review and update of your plan, do it now. Make it an annual priority.

It won't happen to our firm. According to the most recent ABA Data Breach Survey, one in four law firms with more than 100 attorneys have experienced a data breach incident. And if you're thinking your firm isn't large enough to fall prey to the statistics, the same survey revealed that one in two firms with fewer than 50 attorneys reported having a cybersecurity or data breach incident. It's the data that makes law firms attractive targets, not the size. If your firm has highly valuable information such as Social Security numbers, dates of birth, financial- or health care-related records, business transactions or intellectual property, it is a target.



Cybersecurity is too expensive and complicated. It doesn't have to be. While every firm needs to follow all the necessary industry and regulatory best practices for safeguarding confidential information, a reasonable approach should be taken to assess risks, identify contractual or regulatory requirements, implement appropriate security policies and procedures responsive to those risks, and ensure that security measures are continually updated. What is reasonable to your firm may be different from other firms of different size and scope. To determine what is reasonable and necessary for your firm, you may need to seek outside expertise from a cyber risk management service provider specializing in law firm information security and compliance.

Cyber risk management is an important new responsibility in the business of law. Unfortunately, these common misconceptions are used far too often to justify doing business as usual and hoping for the best. With law firms specifically targeted by cybercriminals, this is not a wise strategy.

Successfully implementing and maintaining a proper information security plan starts from the top down with management commitment and the understanding that data security and privacy is a firm-wide responsibility, not just something you expect IT to handle.

Law firm administrators, directors or chief operating officers are ideally positioned to coordinate this effort and properly manage the firm's overall information security and compliance plan. Instead of going it alone, firms may consider working with outside cyber risk management providers to identify reasonable and affordable ways to protect the firm and its clients. ■

ABOUT THE AUTHOR

James Harrison is the Founder and Chief Executive Officer of INVISUS, and has partnered with ALA VIP Partner BreachPro to provide the InfoSafe Certification program to ALA member firms. He is INVISUS's market strategist and product visionary, responsible for the development of the company's cybercrime, identity-theft and data-breach prevention and compliance product lineup.

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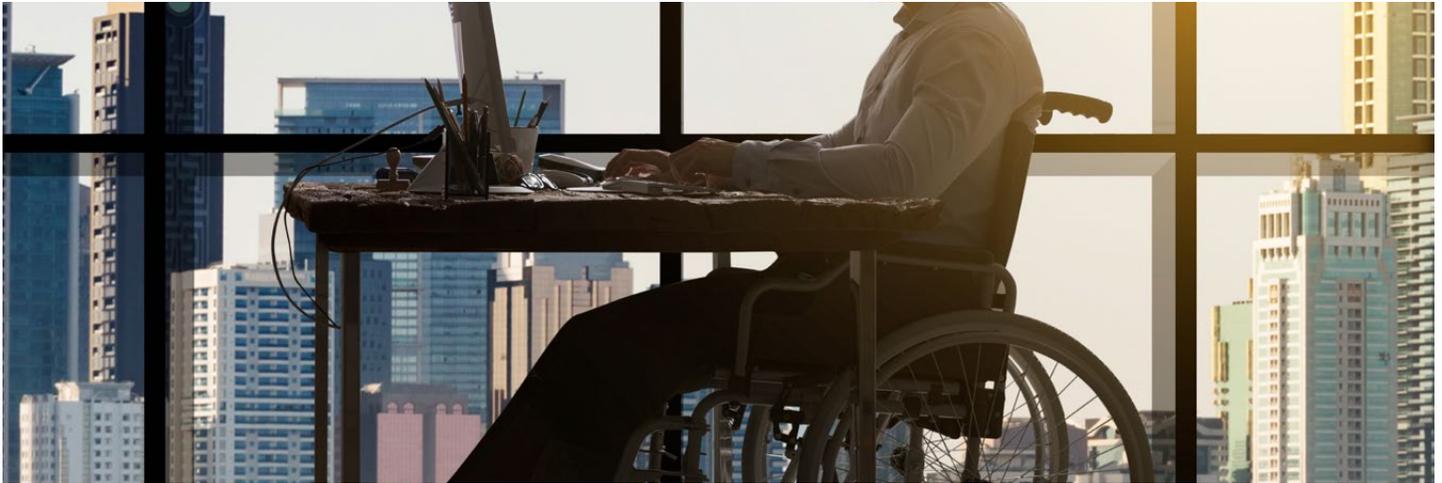
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MICHELLE SILVERTHORN
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 on Professionalism

5 Things to Know About Lawyers with Disabilities

Quick — think of diversity in the legal profession. What comes to your mind?

Women, racial and ethnic minorities, and LGBTQ people might be your immediate thoughts. You might think of diversity discussions you’ve had at your law firm, affinity groups you’ve participated in, or bar association meet-ups that highlight the traditional narrative of diversity. The problem, however, is that traditional narrative of diversity more often than not leaves out one very significant group: lawyers with disabilities.

Figuring out how many lawyers with disabilities exist in the United States will always, at best, be a guessing game. The range of disabilities is so broad, and often the stigma attached to self-reporting is so strong, that there are many who might prefer to not openly reveal their disabilities. The most recent NALP Report on Diversity in U.S. Law Firms identified one-third of 1 percent of law firm associates and partners as having a disability — a number that, while low, is much higher than reported in the past. NALP also estimates that between 1 and 2 percent of law school graduates identify as having disabilities.

Both of those numbers need to change. Haben Girma, a Harvard Law graduate and Deafblind lawyer, was recently profiled as an ABA Legal Rebel. “When companies increase their hiring of people with disabilities, they benefit from the talents of people with disabilities,” she told the *ABA Journal*.

I reached out to a prominent disability rights advocate for his thoughts on lawyers with disabilities and how legal organizations can improve both education and inclusion. Barry Taylor is the Vice President for Civil Rights and Systemic Litigation at Equip for Equality. As a nonprofit organization providing free legal advocacy services, Equip for Equality advances the civil and human rights of people with disabilities in Illinois. It focuses on five areas: special education, discrimination, abuse/neglect, community integration and self-determination.

“A major thing that law firms can do is to include disability as part of its diversity plan, including recruiting new attorneys and supporting existing attorneys.”

What follows is a lightly edited version of my conversation with Barry.

Q: What do you think are the biggest hurdles facing lawyers with disabilities?

A: One of the biggest hurdles lawyers with disabilities face is the incorrect perception that you cannot be an effective attorney if you have a disability. Many of our attorneys have visible and invisible disabilities and they are incredibly effective advocates, and for our work, their disability often informs their advocacy and is a basis for developing a trusting relationship with the client. Educating law schools, law firms, opposing counsel and the judiciary is key for attorneys with disabilities to be treated with respect.

Q: Can you give examples of accommodations law firms have provided lawyers with disabilities?

A: Reasonable accommodations must be based on an individualized assessment and an interactive process. What works for one attorney with a disability may not work for a different attorney with the same disability. So communication is a key. For deaf attorneys, accommodations could include providing a sign-language attorney or captioning for meetings. For attorneys who are blind or have low vision, accommodations could include providing information in alternate formats like Braille, electronically or in large print. For attorneys who use wheelchairs, accommodations can include ensuring that the workplace and the individual’s workspace are both physically accessible. For attorneys with mental illness, accommodations could include providing leave or a modified work schedule to allow attendance at therapy sessions.

Q: What advice would you give to a new law student who has a disability on how to navigate the next three years, particularly when they may feel sensitive about disclosing their disability status in the competitive world of law school?

A: Disclosure of disability is a very personal decision that each person must make. There is still a great deal of stigma in our society about certain disabilities — such as mental illness — and people have the right to keep their disability confidential. The key question is: Do you need an accommodation to be successful in law school? If so, it’s important to ask for one, typically through the university’s disability services department. Unfortunately, some students wait until things aren’t going well to ask for the accommodation, and that often can be too late. Many law schools have started disability affinity groups that can be a place for support and for building community and awareness.

Q: What more would you want law firms and bar associations to do to assist people with disabilities?

A: A major thing that law firms can do is to include disability as part of its diversity plan, including recruiting new attorneys and supporting existing attorneys. Many law firms have enhanced their diversity for women, racial and ethnic minorities and the LGBTQ community, but often disability isn’t included in a firm’s diversity efforts. Once disability is included, then the firm needs to make a commitment to provide the accommodations and support for those attorneys to be successful, including putting the cost of accommodations into the firm’s budget.

Many bar associations, including the Chicago Bar Association and the Illinois State Bar Association, have designated committees to focus on disability issues. These forums are typically focused on disability law rather than issues facing lawyers with disabilities, so expanding the focus to include programming for attorneys with disabilities would be very helpful.

Q: Thank you for speaking with me. Is there anything else you’d like to add?

A: There are many good resources available on this issue, including the EEOC’s publication on reasonable accommodations for lawyers with disabilities, the Job Accommodation Network, and the Burton Blatt Institute Employer Toolkit for including workers with disabilities in the workplace. Finally, in Chicago an Equal Justice Works Fellowship has been established for a new attorney with a disability to do a two-year post-graduate fellowship with a legal aid organization. McDermott Will & Emery sponsored the inaugural fellowship, and Dentons is sponsoring the current fellowship. ■

ABOUT THE AUTHOR

Michelle Silverthorn is the Diversity and Education Director for the Illinois Supreme Court Commission on Professionalism. Through the Commission’s online platform, 2Civility, Silverthorn works on blog posts, social networking sites, and online discussion groups focusing on legal education, diversity and young lawyers. She also works with law schools, law students and other legal groups, developing education courses and workshops.

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JUDYE CARTER RELEFORD
Director of Client Development
BigHand

How Document Production Technologies Can Save You Thousands

“

Technology can help administrators achieve real efficiencies and cost savings, which frees them to focus on other areas.”

The legal market remains highly competitive, and firms are constantly searching for ways to continue to produce high-quality work while keeping a keen eye on the bottom line. Legal management professionals understand these challenges as well as anyone else at the firm.

One obvious way to improve service delivery is through adopting new technologies to create efficiencies across all areas of the firm, including the document production function. With document production technologies, firms can create, format, clean, store and retrieve files quickly and consistently. Yet many law firms are understandably reluctant to purchase and implement new technology that won't pay for itself quickly.

Fortunately, there are real numbers and real-life examples of how firms can achieve time and cost savings with document production technology. With this information, law firm managers can demonstrate the return on investment (ROI) for technology that will free up support staff and attorneys alike to improve work quality while saving hundreds of hours and thousands of dollars every year.

THE CHANGING NATURE OF LAW FIRM WORK

Law firms can send out hundreds of documents a day, and support staff devote a great deal of time to ensuring these documents are consistent, compliant and professional-looking. With document production tools and templates, administrators can ensure that everyone in the firm maintains internal quality standards and the firm's brand standards, whether the document is a short memo or a complicated contract.

There are several reasons why now is a particularly good time for law firms to consider document production technologies:

Changing ratios for lawyers and staff: The role of support staff has changed in recent years. Staff members are working for more attorneys, which means they need to do more work for different people who have different work styles and approaches.

Younger attorneys embracing technology: Younger attorneys are also taking on tasks that used to be the sole territory of legal support staff. For example, one younger attorney recently realized that she could format Microsoft Word documents as intuitively as her secretary could. By taking on this task, the lawyer could free the secretary to focus on other areas.

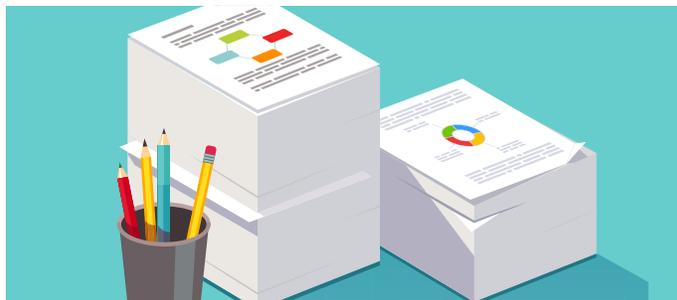
Increasing client expectations: Relationships with clients are also evolving. In the past, clients often believed that law firms were the ultimate experts in a variety of areas, including document production. That is no longer necessarily true. One firm recently discovered that the hard way, when a team working with a government agency failed to implement best practices for document production. The client expressed its disappointment several times. When the firm still failed to deliver the required level of quality, the client demanded a new team.

DEMONSTRATING THE ROI OF THE RIGHT TOOLS

Document production technology can help firms manage with all of these challenges. Along with anecdotal information, there is now quantitative data that will allow legal management professionals to demonstrate the ROI of these types of technologies.

Consider a recent study conducted by BigHand, which looked at the efficiencies gained by using several different types of technologies to augment basic Word functionality. One technology allows for a group of formatting tools that makes it easier to use Microsoft Word functionality like styles, numbering and tables of contents.

According to the survey — which included 175 responses over a six-week period — users reported that the tools saved them between one and four hours of document formatting time per day, compared to using native Microsoft Word. The average time savings amounted to 90 minutes a day, which equates to 376 hours, or 53 full working days, saved per user annually. That works out to an average cost savings of



\$7,733.31 per single user, based on the average North American annual salary.

The survey also found impressive savings from the use of a document template management tool. The average respondent created 10 new documents per day. Without using technology, it took an average of 22 minutes to complete each document. With document template management technology, users could cut that time to only seven minutes — a 69 percent reduction. In total, the technology saved users an average of two and a half hours of document production time per day, which equates to 627 hours, or 89 full working days, of additional time per user every year. That is an average annual cost savings of \$12,888.85 per single user.

These time and cost savings are averages — some firms have experienced a far more significant ROI. Legal management professionals play a key role in helping their firms adapt to the changing competitive environment. Technology can help administrators achieve real efficiencies and cost savings, which frees them to focus on other areas. And now, administrators can demonstrate significant ROI to make the case for adopting these technologies. ■

ABOUT THE AUTHOR

Judye Carter Releford has worked with the BigHand Create product (formerly known as iCreate) since 1997. Today she is an integral part of the BigHand team as Director of Client Development, where she enjoys participating in international business development efforts, contributing to industry thought leadership and delivering training via weekly webinars.

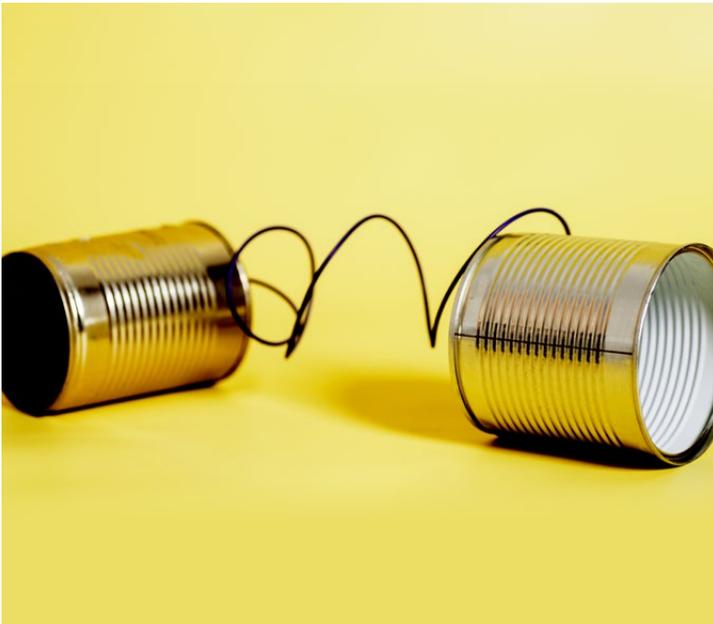
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Facts and Stats



COMMUNICATION WOES IN THE OFFICE

Fierce Communications and Quantum Workplace teamed up to survey 1,300 people across the country about communication in the workplace.

People were asked which communications were more susceptible to miscommunication in the office. The results:

- 46 percent of respondents said emails, texts, telephone conversations, and posts shared to social media and instant messaging platforms
- 11 percent said communicating in person
- 43 percent said both

You can view the full report for free by filling out some basic information. (View the web version of this article for the link.)

DID YOU KNOW?

According to statistics from Global Workplace Analytics, 50 percent of the workforce in the United States has a job that is compatible with telecommuting, and 20 to 25 percent of workers telecommute at some frequency.

Read more in this month's OM Feature, "How to Make Telecommuting Work for Your Firm," Page 26.



CANNABIS POLICY DATABASE AVAILABLE

As we detailed in our September cover story, "Marijuana Makes an Impact on Legal," legal issues surrounding marijuana will continue to be an area of potential business growth for firms. CannaReg — a new platform maintained by lawyers and updated daily — is now available to keep legal management professionals current on cannabis laws and regulations by state. Learn more at www.cannaregs.com.



HOW IMPROPER DOCUMENT MANAGEMENT COSTS YOUR FIRM

- Files in most law firms are missing almost 50 percent of the information they need.
- 80 percent of information in firms is stored in email.
- 1 in 4 legal workers fail to follow compliance standards for document management and retention.
- Dealing with issues related to paper files costs 3.5 hours per week, or 7 percent of an employee's time.
- The time wasted on improper document management accounts for 9.8 percent loss in total productivity and costs law firms an average of \$9,071 per lawyer per year.

To read more stats, check out the complete infographic from eFileCabinet. (View the web version of this article for the link.)

ALA's 2017 Compensation and Benefits Survey

Every year, new job titles and levels of responsibility crop up as the legal industry evolves, and ALA's Compensation and Benefits Survey helps define these new positions and their value to firms.



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Expanding Your Horizons

Launching new, out-of-state satellite offices requires careful planning. Find out what your firm needs to know.



ERIN BRERETON

Owner, Chicago Journalist Media

Fourteen-attorney firm Griesing Law has expanded its Philadelphia headquarters three times since opening in January 2010 — moving from an 800-square-foot office to a new 4,000-square-foot address, then to a 9,000-square-foot office in the same building.

So the firm, which branched out to New York in 2016, knew that when it decided to open a new location in Cincinnati earlier this year, the space it procured had to allow for growth.

“Opening satellite offices when you’re not acquiring another firm, you’re trying to build growth organically,” says Griesing Chief Operating Officer Jessica Mazzeo, an ALA member. “We took what we needed for now and have a short-term, two-year lease that allows flexibility about when we can add space.”

Because firms often don’t know what business will be like years from now when entering a new market, many try to negotiate an agreement that’s three to five years or less, according to Tiffany Winne, Executive Vice President and Branch Manager at commercial real estate firm Savills Studley.

“When a major law firm is opening up a new office in a city where it doesn’t have a presence, it’s trying to make bets about real estate from a risk mitigation perspective,” Winne says. “You don’t want it to take too much capital if it’s a pilot or experiment.”

“The process of securing space and negotiating flexible terms is not a quick one. So it’s better to kick the tires and start evaluating what your options look like as soon as possible — that’s time you can’t make up.”

Office square footage is just one element law firms need to consider when opening a new location in another state. Failing to address a number of other important aspects — ranging from local fees to the time it takes to set up utilities — can potentially cause delays that end up costing the firm a considerable amount of both time and money.

If you’re contemplating opening a satellite office outside of the state or region your firm is currently located in, the following suggestions may help prevent any unwanted — and potentially problematic — surprises.

“When a major law firm is opening up a new office in a city where it doesn’t have a presence, it’s trying to make bets about real estate from a risk mitigation perspective. You don’t want it to take too much capital if it’s a pilot or experiment.”

Land the right lease. Although subleases sometimes seem to make sense to firms because they’re typically shorter and less expensive, there are some advantages to having a direct lease relationship with a landlord, according to Winne.

Winne recently worked with a large firm opening an office in Los Angeles that initially considered subleasing, but ultimately decided to do a three-year direct lease. This proved beneficial a year and a half later when its new space was full. The landlord tore up the lease, and the firm was able to obtain larger space elsewhere in the landlord’s portfolio.

“If the firm had subleased, it wouldn’t have been able to get more space unless it moved and sub-subleased, which can be difficult,” Winne says. “You remain financially on the hook for the subtenant’s risk, and if issues come up, you have to take it to the company you subleased from, who has to take it elsewhere to get it dealt with.”

Investigate additional expenses. Many firms underestimate the cost of various office improvements, which can be

expensive, according to Luke Raimondo, Savills Studley Corporate Managing Director.

“I’ve seen costs between \$25–\$30 a foot on furniture; AV can be \$5–\$10 more a foot,” Raimondo says. “Those are costs some firms seem to underestimate. They’re not on the surface, so they can be missed initially.”

Allow ample setup time. Some items are fairly easy to purchase, but installation can cause major delays, according to ALA member Paul Boken, Chief Operating Officer at 23-location law firm Dinsmore & Shohl, which opened Washington, D.C., Philadelphia and San Diego offices in the past six years.

“Usually, technological equipment has a short lead time — you can get a new copier in a week or two,” Boken says. “The response times and responsiveness of telecommunications companies varies, and it always takes longer than everyone expects.”

If you find you haven’t allowed enough time to get phones set up before the office opens, you may be able to temporarily work around the issue.

“My IT department would never recommend this — it’s not as secure as a line from a phone company — but you can put a wireless node in an office, like turning a cell phone into a wireless hotspot, and use it to get up and running,” Boken says. If you are put in this situation, make sure you work with your IT department to ensure data is as protected as possible.

Order desks and other large items as early as possible. “Furniture can have a four- to six-week or longer lead time,” Boken says. “Other times, you may have an unexpected situation — the office doorframe can’t be installed until the Houston plant that stopped doing anything after [Hurricane] Harvey gets production back in line.”

Confirm local fees. Firms may need to pay regional taxes when they enter new areas.

“The response times and responsiveness of telecommunications companies varies, and it always takes longer than everyone expects.”

“Usually you have to register with the city, sometimes with the state; certainly, if it’s a new state, you’re going to be filing taxes in that state,” Boken says. “In New York, there’s a tax if you’re renting [a certain amount’s worth of commercial space]; some [costs] are obvious, some are less obvious.”

If online resources don’t offer enough information, he recommends reaching out for advice.

“Talk to another local firm in the city; I’d call my accountant to see what they know,” Boken says. “You typically find you need to do a little research to understand what the rules may be.”

Insist on systems training. Dinsmore has found a formal integration can help new firm members who work in satellite offices become familiar with its processes.

“Their preference might be to use the system they’ve always used,” Boken says. “We need them to use our document management system, as opposed to, for example, using the network drive to store data and documents.”

New Griesing hires come to the firm’s Philadelphia headquarters for training and orientation.

“It gives them tons of resources to take back to new offices,” Mazzeo says. “[And] once or twice a week for the first two months, we check in for over an hour, making sure they’re up and running and don’t have any questions.”

GROWING PAINS

In recent years, some firms have intensified the resignation period requirements included in partnership agreements, according to Law360. Some have reportedly enforced pre-existing requirements more strictly.

In 2010, Chicago law firm Wildman Harrold required six partners who were leaving for another firm to remain on board as part of a provision that they give 90 days’ notice, according to the *Chicago Tribune*.

In 2014, international firm Squire Sanders (which has since gone through a merger and name change) required four

health care partners who were moving to another firm to remain for 60 days, according to Law360, which noted the move was a relatively rare occurrence in BigLaw.

“Opening satellite offices when you’re not acquiring another firm, you’re trying to build growth organically.”

The resulting uncertainty, coupled with fears an attorney may renege on plans to join the partnership, can be problematic for firms trying to expand to accommodate a new hire.

“The challenge is you need to open an office but don’t know the exact date people are coming,” Boken says. “Until they’ve made a commitment to you, it’s really difficult to sign for space.”

That said, to position the firm to be able to act quickly if and when it needs to, Raimondo recommends doing as much groundwork as possible after talks to hire a rainmaker begin.

“Make sure the partner is absolutely coming on board before making a financial commitment to some space, but do your due diligence early on, even if you don’t know for sure if it will happen, just so you’re not behind the eight ball if it does,” he says. “The process of securing space and negotiating flexible terms is not a quick one. So it’s better to kick the tires and start evaluating what your options look like as soon as possible — that’s time you can’t make up.” ■

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

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Trending Resources: 8 Progressive HR Practices for the Modern Law Firm

Firms are increasingly focusing on modernizing their HR practices to attract and retain top talent.



MARY KATE SHERIDAN
Writer, Editor and Attorney

“Innovative” is not typically the first word used to describe law firms. But with an evolving workforce and explosion of technological advances, many firms are embracing more cutting-edge ideas to attract the best talent and provide top-notch service to their clients.

Indeed, 50 percent of respondents to Altman Weil’s 2017 Law Firms in Transition Survey indicated that their firm is actively engaged in creating special projects and experiments to test innovative ideas or methods.

As attorneys and staff increasingly become a priority, firms are modernizing their human resources practices to attract and retain top talent.

“It is absolutely integral that law firms take their human resources as seriously as possible,” says Jordan Furlong, Principal of Law21. “I’m not sure that law firms have traditionally appreciated that as much as they do now.”

One-size-fits-all training is no longer meeting the demands of diverse associate classes, who come to firms with wide ranges of life experiences.

Below are eight progressive human resources practices being adopted within law firms.

1. HOLISTIC DEVELOPMENT

One-size-fits-all training is no longer meeting the demands of diverse associate classes, who come to firms with wide ranges of life experiences. “Law firms are taking their human development or their human management more seriously than they have in the past, which is unquestionably a good thing,” says Furlong.

Some firms have found that a more holistic approach to training is more effective at reaching and developing attorneys and staff at the firm.

“We recognize that everyone comes to us with a unique learning need — there are people who come to us experienced, people who come right from school, people changing practice groups, and people coming on the staff side with different responsibilities,” says Susan Manch, Chief Talent Officer at Winston & Strawn LLP. “We want to provide training that is specialized to that person and his or her needs. We want to have the right environment for people to learn with a 360 approach.”

At Winston, this holistic approach includes a development framework based on four core competencies: 1) client focus, 2) management skills, 3) professionalism and leadership, and 4) legal excellence (for attorneys) and professional excellence (for staff).

“We make sure everything that we do to train people, as well as the way we recruit and make hiring decisions, are focused on these core competencies,” says Manch.

2. IN-HOUSE COACHING

Firms are also bolstering their development programs with personalized coaching for attorneys and staff.

For example, Pillsbury Winthrop Shaw Pittman LLP has an in-house career coaching program. The coaches offer a confidential, safe place to discuss one’s career trajectory, says Kathleen Pearson, Chief Human Resources Officer at

Pillsbury. They work with attorneys on everything from time management to business development. To encourage attorneys to use the coaching services, Pearson and her team select a different class each year to participate in one mandatory coaching session.

Similarly, to support its holistic development strategy, Winston hired an internal coach to work with all attorneys and staff on career planning, refining development and achieving peak performance. The in-house coach will also supervise the firm’s external coaching programs, such as business development, parental leave and secondment advising.

“We are making sure that we’re giving everyone the individual attention they need,” says Manch. “You can go to a training program and hear lots of information, but you may struggle with how to apply it in your practice. That’s where coaching comes in.”

3. INFORMAL REVIEWS

With a more holistic view of development and an appreciation for the faster pace of today’s legal environment, firms are shifting their outlooks on how to handle performance evaluations.

“The emphasis in performance management is moving very significantly away from review-based feedback to data-driven coaching and mentoring,” says Terri Mottershead, Principal of Mottershead Consulting. “Firms are increasingly making feedback part of an informal, development-focused, ongoing two-way dialogue, which is based on data. The dialogue happens when needed, so midcourse corrections can be made or support provided.”

This informal approach better complements fast-paced modern legal practice and still allows for organic opportunities for performance discussions.

For example, Mottershead advises firms to discuss performance during key junctures in a long matter and end-of-matter debriefs. “This provides a great opportunity to bring

Legal human resources departments are achieving greater efficiency and organization through software management, allowing firms to automate and manage areas like recruiting, training, benefits and more in one place.

the whole team together, look at data that identifies gaps, be very candid about how everyone performed, celebrate and entrench what worked well, determine what could have been done better, focus on whether client needs and expectations were met, and explore how each person's strengths can be best used going forward," says Mottershead.

Another way that firms are innovating their review systems is by changing the communication relating to the performance. Baker McKenzie, for example, eliminated ratings associated with performance.

"It took that stress away of rating people and allowed supervisors to provide more meaningful feedback to them on actual performance and, more importantly, the expectations," says Kristina Camaj, the firm's North America Director of Human Resources.

4. EMPHASIS ON STAFF DEVELOPMENT AND ASSESSMENT

Staff development has become an important focus as law firms recognize the value of training and retaining top non-attorney talent.

Baker McKenzie, for instance, offers a self-service training tool for non-attorney employees, with a wide variety of learning opportunities including leadership and writing skills. This tool is complemented by a newsletter that highlights available training opportunities.

"This training system is a great tool for managers to use when developing the performance priorities and objectives," says Camaj.

Staff performance reviews are another area that firms are overhauling to address the unique needs of today's workforce. Pillsbury is launching a new review system for its staff that focuses on performance behaviors and best practices. Through this review process, staff will create goals to move their careers forward.

"We live in a very dynamic world and all of our skills need to keep up," says Pearson.

Additionally, some firms are changing their approach to staff skill assessments. Firms are taking a gentler approach with "knowledge checks" to understand employees' skills, says Cindy Mitchell, Director of Product Development at Traveling Coaches. "They're focusing a lot more on the development of specific competencies," she says.

5. FLEXIBILITY AS POLICY

According to Cushman & Wakefield's Bright Insight: The 2017 National Legal Sector Benchmark Survey, associates' No. 1 priority is work-life balance.

"Nearly every time I meet with law students, they are concerned with work-life balance and work-life fit," says Kate Bischoff, Employment Attorney and HR Consultant at tHRive Law & Consulting LLC.

While many firms permit flexible work schedules, some are now offering formal flex-time policies. One such policy is behind Baker McKenzie's new program: bAgile. This program formalizes four types of flexible working for both attorneys and staff: remote work, part-time hours, alternative hours and time off. The firm previously offered various formal and informal flexible working opportunities, but Camaj notes that only pockets of people were taking advantage of the opportunities.

"We wanted to have an avenue where people felt comfortable making these requests, and HR, the employee and the supervisor could work together," she says.

6. GENDER- AND ROLE-NEUTRAL LEAVE

Another progressive work-life leap is the offering of gender-neutral and/or role-neutral parental leave programs.

Pillsbury offers all employees — regardless of gender or position at the firm — 12 weeks of paid leave to be taken during the first year of the child's life. This policy extends to adoption, as well.

"We're really proud of our gender- and role-neutral new-baby-care policy," says Pearson.

Staff development has become an important focus as law firms recognize the value of training and retaining top non-attorney talent.

Winston couples its gender-neutral parental leave policy with personalized coaching before and after the leave period, and it provides a transition period upon the parent's return to build back up to billing at full pace.

"We felt we owed our attorneys this leave benefit," says Manch. "They have to work so hard. This gives them the opportunity to have a real downtime with their child." According to Manch, law students and lateral attorneys have been drawn to this broader parental leave offering. "This is a program that really recognizes that life has changed," she says.

7. TECHNOLOGY AND AUTOMATION

Legal human resources departments are achieving greater efficiency and organization through software management, allowing firms to automate and manage areas like recruiting, training, benefits and more in one place. Firms may select from a range of options, including human capital management (HCM), human resource management software (HRMS) or human resource information system (HRIS), depending on their needs. Or they may customize

a system. HCM systems like Workday are appealing because they include talent management, providing a broader reach.

According to Camaj, a more comprehensive approach is ideal because it provides firms with data on the entire life cycle of an employee.

No matter how firms proceed, they should be aware of the options as well as automation's impact on the legal sphere.

"To me, it's a differentiator," says Manch, whose firm is developing its future human resources data- and program-management system, which will include learning paths, a performance assessment and management component, an HRIS system, and a learning platform for their e-learning library. "The legal market is very crowded. For us to attract the very best people, we have to offer an engaging workplace — a place where, if you come here, you will be better because we're going to support you in achieving peak performance."



Winston couples its gender-neutral parental leave policy with personalized coaching before and after the leave period, and it provides a transition period upon the parent's return to build back up to billing at full pace.

Along with automation, some firms are exploring how artificial intelligence can bolster human resources. In fact, more than one-third of respondents to Altman Weil's 2017 Law Firms in Transition survey indicated that they are already using artificial intelligence tools or have begun to explore such tools.

Firms should familiarize themselves with the technology and how it may improve their human resources functions. But firms shouldn't adopt artificial intelligence blindly. "The concern is that artificial intelligence tools can have bias just like a human, so there are risks," says Bischoff. Firms must fully inform themselves of all their options, as well as the benefits and downsides associated with the technology.

8. BROADENED RECRUITING FOCUS

Attracting top talent has never been more important for law firms, and this is true not just for attorneys but also for staff positions.

Modern technology's influence on legal practice has made efficiency (as it relates to operations, processes and systems) and effectiveness integral to how law firms work, says Mottershead. It has also resulted in non-attorney specialist positions evolving into specialist professions, she

says. Thus, recruiting non-attorney specialists who will bolster the firm's work and income-earning activities is critical. Human resources professionals must understand the business of the firm and where it's going as they develop these hiring strategies, says Mottershead.

With changing approaches to performance management, talent management, work-life policies and efficiency, firms are placing a greater emphasis on their biggest assets — their people. To remain competitive, firms should stay abreast of progressive trends and continue to strengthen their human resources strategies to attract and retain talent. ■

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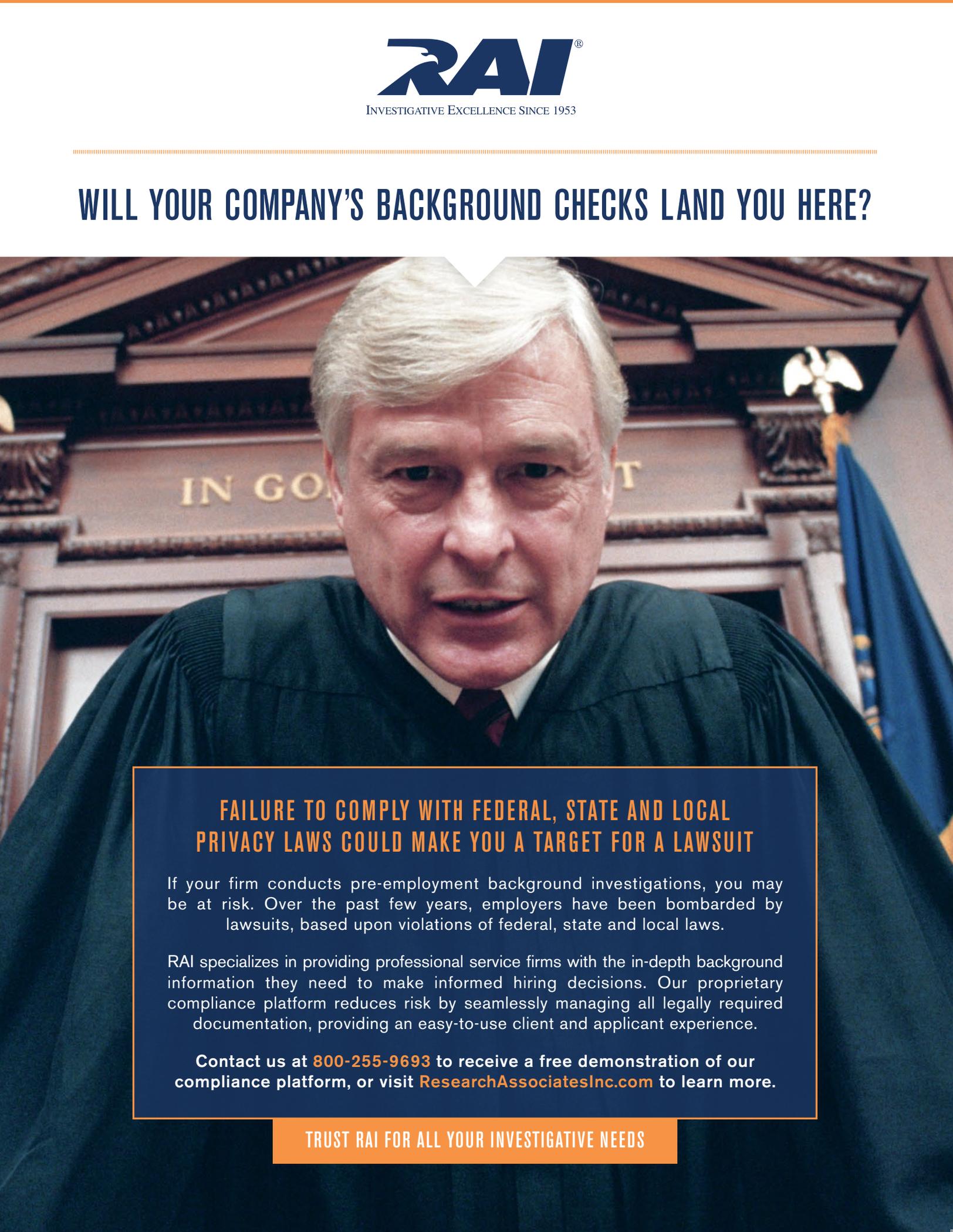
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How to Make Telecommuting Work for Your Firm

As more employees demand more flexibility, law firms are learning how to adapt to the telecommuting trend.



KYLIE ORA LOBELL
Freelance Writer

As the world increasingly goes online and people rely more and more on their mobile devices, telecommuting has caught on in the workplace.

According to statistics from Global Workplace Analytics, 50 percent of the workforce in the United States has a job that is compatible with telecommuting, and 20 to 25 percent of workers telecommute at some frequency. Though most companies do not yet allow part- or full-time teleworking, 80 to 90 percent of American workers say they would like to work from their computers at home at least part time.

And it's no surprise — more than two-thirds of managers say that there is an overall boost in productivity from their teleworkers, according to *Forbes*. In addition, workers are less stressed because they don't have to commute, and teleworking enables more flexible schedules that can help older employees, parents and people with chronic illnesses or disabilities stay in the workforce.

“Law firms have historically not put enough emphasis on security during the telecommuting process, which can lead to a plethora of issues for the firm. Security protocols are a must for firms looking to implement telecommuting.”

TELECOMMUTING IN THE LAW FIRM

Some big law firms have jumped onto the telecommuting trend. According to Paul M. Ostroff, Partner and Shareholder at Lane Powell Attorneys & Counselors, several larger firms — including Morgan Lewis, Baker McKenzie, Jackson Lewis, and Shearman & Sterling — now let employees telecommute a certain number of days per week.

Other law firms may want to follow in these bigger firms' footsteps. But before they do, they need to weigh the advantages and disadvantages of telecommuting.

“If implemented correctly and thoughtfully, I believe it's very wise for law firms to allow their employees to telecommute,” says Caroline Cantelon, Sales Manager for Speech Processing Solutions Canada. “Having said that, many law firms have historically not put enough emphasis on security during the telecommuting process, which can lead to a plethora of issues for the firm. Security protocols are a must for firms looking to implement telecommuting.”

TAKING SECURITY PRECAUTIONS

Telecommuting brings a whole host of security issues. If employees log on to public Wi-Fi and the network is then hacked into, the law firm's information could be stolen. If employees forget to log out of shared computers, other users could see private, sensitive data.

“No matter what technical approach is used for remote access to sensitive information, employee security awareness training is imperative. People are your weakest link when it comes to security.”

“The proliferation of data copies through file sharing services and staff use of personal devices present security challenges,” says Forrest Blair, President of Programs and Services at AirDesk Legal. “In those cases, it can add risk as it gets more difficult to keep all copies of the data secure.”

On the employer side, law firms can use cloud services to keep sensitive documents secure on a private hosted server, says Blair. “The telecommuters connect through a secure link and access a virtual workspace where they work with client data. The confidential data never leaves the secure environment. Staff can use any of their own personal devices to access the data through an encrypted secure connection.”

According to Cantelon, secure authentication is also critical. “[It] means more than just a PIN code,” she says. “It should require additional authentication factors to access servers or view confidential information. Organizations can require two-step authentication, a PIN and tokens that change each time one requests access to a VPN, which will keep data secure if a device is stolen or if the firm is hacked by a third party.”

Even if the law firms do everything right, employees may still make some missteps. Heinan Landa, Chief Executive Officer of Optimal Networks, says workers need to be trained on safety matters. “No matter what technical approach is used for remote access to sensitive information, employee security awareness training is imperative. People are your weakest link when it comes to security.”

To ensure this training actually occurs, law firms need to require that workers look over and sign agreements before they begin telecommuting.

WRITING A TELECOMMUTING POLICY FOR EMPLOYEES

A telecommuting policy will inform employees about how to keep data protected, even when they are on the go. It will outline how they can secure their devices wherever they choose to work.

“When creating a policy, firms should consider all aspects of the telecommuting process, including: How will employees access files? Will there be protocols for paper copies of files? Will employees be able to store paper files in their home or remote offices? What processes should be put in place for file sharing and reviewing?” notes Cantelon.

“Before implementing any cloud solutions, law firms must review the service’s security protocols to be sure that their sensitive data will be protected.”



Ostroff wrote a sample agreement (see online version for the link) that employers can use when realizing their own plans. He suggests some guidelines that law firms can lay out before implementing telecommuting:

- Employees must consent in writing to electronic monitoring of their devices.
- Employees must install firewalls and security software on their home computers.
- Employees must ensure the purchase of software licenses for remote locations.

Firewalls are important, Cantelon explains, because they act as barriers and prevent unwanted visitors from accessing networks. They also add a layer of security in case the private network is a target for hacking or a computer is stolen outside of the office. The cloud is another safe solution, since it grants individuals access to services, documents, applications and resources via a secure internet connection.

“Cloud services allow employees to maintain a high level of efficiency and security while working outside of the office and away from colleagues,” says Cantelon. “Before implementing any cloud solutions, law firms must review the service’s security protocols to be sure that their sensitive data will be protected.”

Once it is agreed that employees will work with firewalls and the cloud — and they are willing to follow telecommuting policies — Ostroff says employers need to determine exactly whom they will allow to telecommute.

For instance, law firms may require that employees effectively “self-manage” before they are permitted to work from home. They might also only let the top-performing employees or those who have been at the company the longest to telecommute. Practically speaking, workers need to have the appropriate equipment to telecommute, including computers, furniture and supplies, according to Ostroff.

SETTING UP A TELECOMMUTING PROGRAM

Law firms that want to start their own telecommuting programs should begin by further educating themselves on security risks, assessing said risks, coming up with policies and deciding who they will allow to work from home.

After weighing the pros and cons, law firms can determine if telecommuting is going to work to their advantage and contribute to their overall success. ■

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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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URI GUTFREUND
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Avoid These 4 End-of-the-Year Insurance Headaches

The end of the year is always a hectic time for legal management professionals: budgets, projections, cash balances, employee reviews and bonuses are some of the big tasks coming due.

There are also end-of-the-year insurance issues that come up, too. Some insurance renewals, open enrollment meetings and decisions about flexible spending accounts/health saving accounts (FSA/HSA) are some of the most common ones.

Here are four less obvious — but important — insurance and risk management issues to look out for as you head into your end-of-the-year busy zone.

Professional Liability: End-of-the-year time crunches present unique professional liability risks for your firm. Many lawyers are working extra hard to squeeze in the maximum amount of billable hours in the final months of the year. Overworked and tired lawyers are more likely to make careless mistakes and more prone to look for shortcuts in their attempt to get the most done by year's end. While peer review (even for partner-level work) and extra staff can be helpful, it is critical that the firm management message be one of maximizing the time available, but also keeping to the highest professional standards.

Clients can also sometimes be difficult to work with around the holidays. Despite needing the legal work completed, they can sometimes be hard to reach. Conversely, some clients are working extra hard at year's end and expect your lawyers to do the same.

Encourage your lawyers to have good contact information and increased communication with their clients during this period. Good communication can smooth many clients' demands — plus clients rarely complain that their lawyer is communicating too often with them.

“

End-of-the-year time crunches present unique professional liability risks for your firm. Many lawyers are working extra hard to squeeze in the maximum amount of billable hours.”

Health Insurance/Benefits: Besides the open enrollment and renewal issues that are largely known and planned for in advance, your employees have other end-of-the-year insurance issues that can impact your firm. Many insurance plans and tax-advantaged accounts (FSA, HRA) are calendar-based, meaning that employees are incentivized to use up the benefits or funds during the calendar year. Therefore, it's common for employees to try to take care of any outstanding nonemergency medical appointments in the last few months of the year. Employee absenteeism during this time can disrupt getting needed work done.

Anticipating this challenge, encourage your employees to plan their time out of the office in advance and to keep on top of their reimbursement balances and yearly benefits. Remind your employees to check their balances and send links to their log-in accounts to avoid the end-of-the-year rush.

Cyber Risk: Bad actors continue to find law firms to be rich targets as they are repositories of personal information and a center of financial transactions. Toward the end of the year, there are increased incidences of phishing, also known as frauds against law firms that target the chief financial officer (CFO). The typical phishing scenario is that the CFO or approver of financial transactions (the legal administrator) will receive an email that appears to be from a law firm leader (the managing partner) requesting funds to be transferred or wired. After the money is transferred, the funds are gone and quickly untraceable.

Although it can be difficult to add layers to the process in the fast-paced transaction world, it is critical that you

institute checks and balances to protect your firm. Most firms now have a verbal confirmation before funds are sent, especially via wire. Around holiday time, bad actors know that partners often take vacations and will try to capitalize on this. Therefore, insist on a process that includes verbal confirmation at all times — even during vacations.

Insurance Renewal Timing: If the end of the year is a stressful and super busy time at your firm — and whose is not? — consider moving your insurance renewals away from the year's end to a time that works better for you. While it can be complicated and cannot always be done on short notice, with the right planning, you can change your renewals to a more relaxed time when you can give the insurance the attention that it deserves.

Consider these insurance challenges in advance so that you can end your year on a high note and set your 2018 on the right course. ■

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The Impact of C-Suite Growth in the Am Law 200

By Anita J. Turner

In some firms, lawyers manage the business of the firm. In others, C-suite business professionals are charged with this responsibility to allow the lawyers to focus exclusively on practicing law and developing business.

My team at Colliers recently completed a comprehensive survey of the Am Law 200 firms to determine which C-suite positions each firm employs. We then sought to understand whether there was any correlation between the existence of a C-suite position and profits per equity partner (PPEP).

Arguably this is a classic problem of the chicken and the egg: Do more profitable firms have more money to hire C-suite professionals? Or do the efforts of C-suite professionals increase profitability? We completed a statistical analysis of our data together with the profitability data the Am Law 200 reported to *The American Lawyer*.

METHODOLOGY

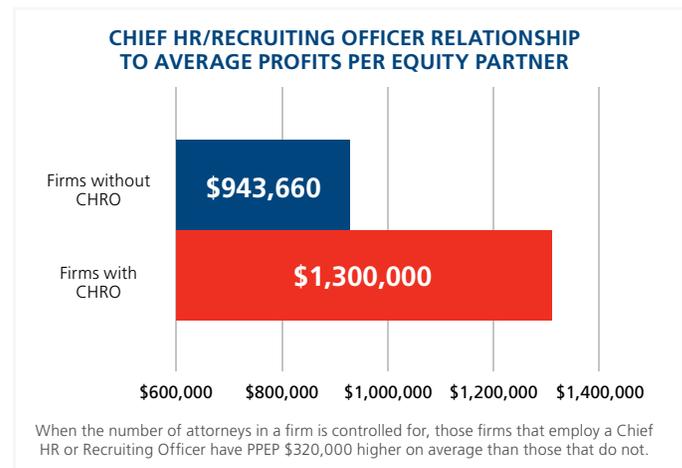
The insights documented herein are the result of a survey of the Am Law 200 law firms. Through email, telephone and internet surveying and research, Colliers was able to document whether 128 law firms (64 in the Am Law 100 and 64 in the Am Law 101 to 200) employed chief-level financial, marketing, IT, knowledge and HR professionals. Regressions of these results were run against the self-reported revenue and profitability data collected by Am Law. Interviews with leading law firm architects, legal recruiters and C-level officers at more than 10 major law firms augmented this research. I am immensely grateful to the many professionals who graciously agreed to share their knowledge with me.

As evidenced in the first graph, there is a strong correlation between the existence of a Chief Financial Officer (CFO) and higher profits per equity partner. Several Am Law 200 Chief Operating Officers (COO) consulted suggest that this is because firms that employ CFOs are typically sophisticated enough to pay attention to complex metrics. Those firms expend significant effort to understand financial data and use

that data to determine what it is going to take to maintain profitability in the new legal market.

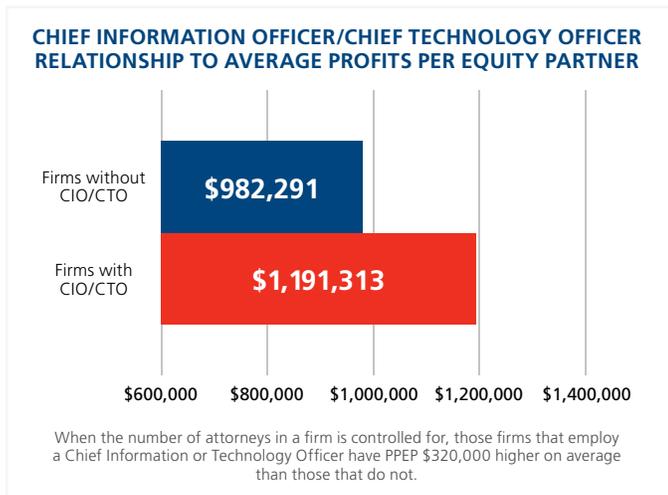


One Executive Director added that the CFO often adds discipline and structure to daily decision-making, citing as an example the hiring of laterals. Where lawyers or practice groups may be excited about a prospective lateral hire and become emotionally invested in the hire, a CFO will model the financial benefits of the hire to analyze whether the acquisition will be good for the whole firm. Essentially, the facts presented by strategic and knowledgeable CFOs help limit the role of emotion in decision-making.



Similarly, there exists a strong correlation between PPEP and the existence of a Chief HR Officer (CHRO). One C-suite member described the CHRO’s job as identifying, motivating, retaining and rewarding a firm’s best people. The CHRO’s duties include helping partners understand generational issues, building a professional development program, and managing a firm’s alumni network — a large source of referrals for many Am Law 200 firms.

According to Citi Private Bank Law Firm Group’s Gretta Rusanow — in a report delivered at the 2016 Law Firm COO/ CFO Forum — continuously profitable firms are more careful and considered when bringing on laterals, and these hires are more successful. In addition, the 2015 Law Firms in Transition Altman Weil study found that 77 percent of firms making major changes to lawyer staffing models had increased PPEP, compared to 56 percent of others. When a CHRO is tasked with managing the lateral hiring process and strategically addressing the need for change in staffing models, it would logically follow that PPEP would increase as a result.



Lastly, there is a strong correlation between PPEP and the existence of a Chief Information Officer (CIO) or Chief Technology Officer (CTO). A 2015 study by Thomson Reuters Peer Monitor confirmed that upper-tier firms (in terms of financial performance) were much more likely to have adopted operational changes focused on technology.*

COOs interviewed for this study cite the fact that CIO/CTOs are usually tasked with making lawyers more productive and efficient as the likely reason for the associated higher PPEP.

CONCLUSION

The most successful Am Law 200 law firms have evolved from being partner-run to being run by a group of highly skilled professionals reporting to the shareholders of the firm. This model is increasingly reflective of the corporate governance model. The data collected from our survey indicates that it is generally conducive to increased profitability for the firms that adopt it.

For growing firms, the addition of a newly formed C-suite position is often driven out of necessity to add order and control to firm management and operations. Firms can be reluctant to add these positions due to the additional overhead burden, but our research shows a strong positive correlation between PPEP and firms with a more extensive network of business executives (i.e., non-practicing lawyers) in leadership positions. ■

**There was not a statistically significant correlation between the existence of a Chief Marketing Officer or Chief Knowledge Officer and a change in the PPEP. Therefore, those statistics were omitted from this report. Further, arguably, revenues are a better measure of a CMO’s impact than profitability.*

ABOUT THE AUTHOR



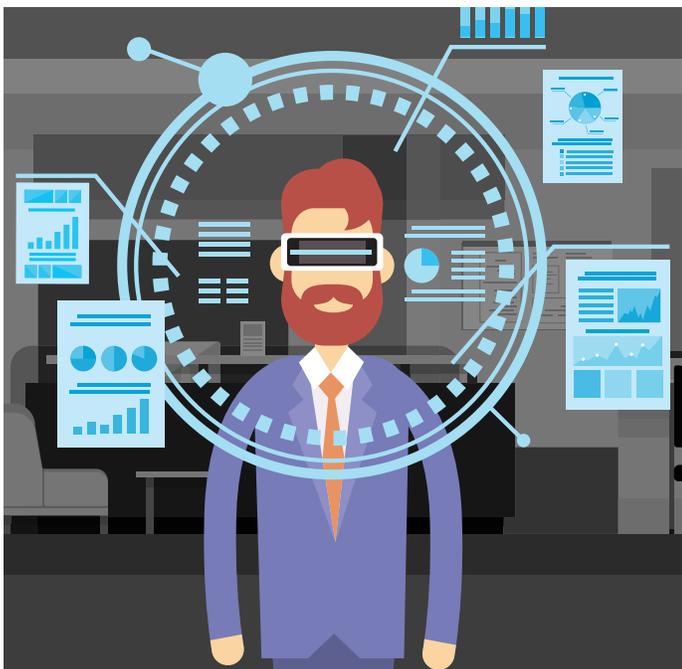
Anita J. Turner is a commercial office real estate tenant representative and adviser. She is a former practicing lawyer and, consequently, she has a special interest in law firms and loves studying the evolution of the legal profession and its effect on legal workplaces. Turner is a graduate of Pepperdine Law School and obtained an MBA from UCLA.

 www.anitainsights.com

This report was excerpted from “The Law Firm C-Suite Study Guide: The Impact of C-Suite Growth in the AmLaw 200.” To read the full report, see the web version of this article.

Virtual Offices: Is It Time for Your Firm to Say Goodbye to Office Space?

By Heinan Landa



For most small- to mid-sized law firms, the two largest expenses are employees and rent. In today's age of economic uncertainty, many firms are seeking ways to eliminate one of the two. Therefore, the concept of virtual offices — abandoning office space altogether in favor of an exclusively remote workforce — has been gaining popularity as a viable option for cutting costs.

According to a Global Workplace Analytics survey, the average real-estate savings if a business employs full-time teleworkers is \$10,000 per employee per year. Multiply this by each of your attorneys and staff, and the justification for saying goodbye to office space becomes clear.

Cost savings isn't the only reason the number of people working remotely four or five days a week rose from 24 percent to 31 percent between 2012 and 2016, though. Multiple studies have found that allowing your team to work from home will do wonders for overall quality of life — and, by extension, their morale and productivity.

In April 2016, Shearman & Sterling introduced a flexible work policy where associates and counsel in all of the firm's five locations can work outside the office up to two days per month. Shearman & Sterling is seeing significant changes in morale: in The American Lawyer's 2016 midlevel associate satisfaction survey, the firm ranked 21st with a 4.355 average job satisfaction score (out of 5). Imagine what the results might be if two days per month turned into five days per week? Other firms nationwide have similar policies, finding that allowing this freedom helps in both recruitment and retention.

The potential benefits are undeniable, but have we reached the point where shifting to a virtual office is something the average lawyer can seriously consider? Maybe.

TECHNOLOGY AS THE PRIMARY VEHICLE

When it comes to determining workspaces, the onus has always been on technology. Are we able to work without being tied to a physical network? Can we perform all of our job duties from the comfort of our homes? Can we do all this without compromising firm security?

The freedom is there. Thanks to developments in virtual desktops and other cloud-based solutions, employees can easily work from anywhere with an internet connection. The technology is well-established, affordable and only growing more sophisticated as time passes.

Combine this core platform with VoIP (cloud) phone systems and the right mix of collaboration tools for your team, and you have the makings for an entirely mobile, effective workforce. It might seem counterintuitive, but *Harvard Business Review* concluded that remote workers are often more engaged with colleagues than in-office workers. The plethora of technological tools available to help workers stay connected makes the difference.

BUT IS IT SECURE?

It's no secret that law firms are a top target for cybercriminals. According to an American Bar Association report, 25 percent

Studies have found that allowing your team to work from home will do wonders for overall quality of life — and, by extension, their morale and productivity.

of law firms with 100–500 employees have been compromised, while 13 percent to 15 percent of firms with 2–99 employees have seen a security breach. That’s scary, considering how heavily law firms rely on data and how much their clients value privacy.

It is also a well-known fact that lawyers must be able to work securely from anywhere — from the courtroom to the boardroom. A recent survey found that 41 percent of those in the law or public policy industry often work remotely.

The good news is, cloud solutions like virtual desktops are typically far more secure than anything your firm could create and maintain at a physical office. But since we know not all clouds and not all providers are created equal, be sure to assess your cloud environment and your cloud provider carefully. Get plenty of information on:

- The data center’s physical security
- Environmental controls in place
- Redundancy measures for internet and power
- Where your data is backed up (and how often)
- The provider’s onboarding process
- How you’ll get support when you need it
- How the solution is helping firms like yours achieve their business goals

If you don’t feel confident based on your provider’s answers, choose another.

Above all, make sure your staff is well-educated about your firm’s new and existing policies as they relate to technology. Education about the importance of security, how to recognize attacks (especially spear-phishing attacks) and how to handle files and emails safely becomes all the more important when working from a virtual office.

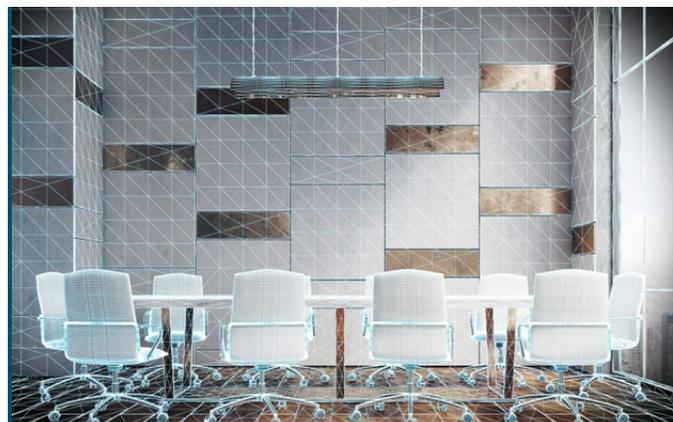
MY RECOMMENDATION

If you’re seriously considering a switch to a virtual office, make sure you explore all security options available to you,

as well as what fits best for your firm and clientele. It is very possible for law firm employees to work both remotely and securely, but it takes some effort.

And keep in mind that the move doesn’t need to be an all-or-nothing scenario — you might find that having some employees remote and a smaller group working from a (smaller) office is the right balance for your business.

All in all, be very intentional with this sort of large-scale change to the way your firm lives and breathes. ■



ABOUT THE AUTHOR



Heinan Landa is the Chief Executive Officer and Founder of Optimal Networks, Inc., an IT company that provides IT support services, including full or partial IT outsourcing, backup and disaster recovery, strategic consulting, and enterprise-class cloud-computing solutions to law firms, associations and small- to mid-sized businesses.

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BILL & PHIL
The Bill and Phil Show
Tech News & Reviews

Bitcoin, Ether, Cryptocurrency and Such

Yes, we know — cryptocurrency is not a gadget. We do love our gadgets, but we love money, too, because it can buy us more gadgets. So writing about Bitcoin, Ether and other cryptocurrency seems a natural fit for our monthly gadget. And, since this topic is so nerdy, it really appeals to us.

“

The blockchain technology that ensures the veracity and security of cryptocurrency transactions is getting the notice of the legal technology world.”

Some say cryptocurrency is the future of money. Others say all cryptocurrencies are Ponzi schemes. Everyone agrees it is a very trendy topic. Banks, accounting firms, governments and securities firms are all researching the topic, and many do not understand the basic concepts behind it.

We believe that Bitcoin and other cryptocurrencies are a logical step in the evolution of money. In caveman days, we traded goods. Then, as we evolved and became more “civilized,” we used precious goods, such as salt, tea, shells or even whiskey as “money.” Next, we created coins out of precious metals and later backed paper money with the equivalent amount of precious metal, such as gold or silver. Since Nixon took us off the gold standard in the 1970s, our money has been purely “fiat money,” or currency without any intrinsic value established as money by government regulation or law.

Now, we rarely use cash or coins, instead using credit cards, PayPal, Venmo or Apple Pay. Most spending transactions are now digital. When we pony up for one of our gadgets, we rarely pay cash — we plop down our credit cards. We pay with “digital cash.”

With credit cards, Venmo, PayPal, etc., you need a payment network with accounts, balances and transactions. For them to work, you need a trusted recordkeeper to verify balances and keep track of transactions to prevent double-spending, among other tasks. An inventor pseudonymously known as Satoshi Nakamoto figured such a system out for digital currency.

The solution is the use of blockchain technology. With blockchain, there is no centralized ledger; the technology uses a network of peers. Every peer has a record of the complete history of all transactions and thus the balance of every account. Theoretically, the peers do not trust one another, so there can be no cheating. The transaction is known almost immediately by the whole network. But the transaction needs to be confirmed.

As long as a transaction is unconfirmed, it is pending and can be forged. Credit-card transactions use a single recordkeeper, and those transactions can be reversed. Not so with blockchain or Bitcoin transactions — once confirmed, they are set in stone and no longer forgeable.

So, you ask, how do transactions get confirmed? So-called “miners,” whose job in a cryptocurrency network is to confirm transactions. They take transactions, stamp them as legit and spread them in the network. After a transaction is confirmed by a miner, every node has to add it to its database. It has become part of the blockchain. For this job, miners are rewarded with a token of the cryptocurrency, such as Bitcoins.

How do miners “mine”? Using a large amount of computing power, they compete to solve a cryptologic puzzle for the transaction. After they solve the puzzle, they add it to the blockchain and it is set in stone. Once the transaction is “mined” and there is a consensus in the network, no one on the network can break or change the transaction.

So these cryptocurrency transactions are irreversible, not identified with any individual (pseudonymous), and secure. The transactions are very fast, and no one has to give permission for them (other than verification by miners).

HOW DOES THIS APPLY TO THE LEGAL INDUSTRY?

The blockchain technology that ensures the veracity and security of cryptocurrency transactions is also getting the notice of the legal technology world. Many envision lawyers using blockchain for smart contracts, as well as other law firm administrative processes. In fact, we believe that in the near future, we will see blockchain being implemented in a number of industries across the global economy. Is this technology the magic bullet for all the cybersecurity ills that plague us today? Probably not, but we do believe it is potentially a big step forward in ensuring secure and legal transactions.

There are several different species of cryptocurrencies out there, including Bitcoin, Ethereum (Ethers), Ripple (not the wine), Litecoin, Monero, Dash and Augur. There are markets that trade in all of them, and they all have value on the open market. Cryptocurrencies are not legal everywhere, but they are legal in the United States. In 2014, the Internal Revenue Service ruled that Bitcoin will be treated as property as opposed to currency for tax purposes — much like precious metals such as gold. This ruling had the side benefit of confirming the legality of cryptocurrency in the United States.

That was your primer on cryptocurrency. Now, we have to fire up our computers and mine some Bitcoin so we can buy more gadgets. ■

ABOUT THE AUTHOR

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

 twitter.com/billandphil

Certify Your Specialty

ALA's eLearning Center offers six-week, instructor-led courses that you can participate in from anywhere. Classes meet live online each week, but each session is available on-demand later.



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Take courses HR1 and HR2, then pass the free exam.

Check out the course schedule for 2018: alanet.org/elearning



idea
AWARDS

Innovators Wanted for **ALA's IDEA Awards!**

Submissions are now being accepted for the 5th Annual Innovation, Development, Engagement, and Advancement (IDEA) Awards.

Continually interested in striving for excellence, ALA encourages its membership to develop new practices that deliver great value and transformational impact to the rest of the Association and the legal industry at large. Do you know of a ...

- Member • Chapter • Region • Committee • Firm • Business partner



... that has developed unique or innovative programs, services or events that improve the legal community and advance the legal management profession. If so, ALA wants to recognize them and promote their good works!

Past winners created a millennial-focused YouTube channel, an Adopt-a-Chapter initiative and a program to leverage talented female attorneys to attract valuable female decision-makers as clients. Recipients will be announced at the 2018 Annual Conference & Expo in National Harbor, Maryland.



Enter your submissions! alanet.org/awards
Send questions to awards@alanet.org

Anniversaries, Awards and Appointments

MEMBERS ON THE MOVE >>>>



Michele Bailon



Janice Chaffay



Kerry McFarlane



Dave Lentz



Jeffrey McGillicuddy



Holly Pulido



Dean Regan



Erin Ross



Nina Sharpe



Desiree Shestakofsky



Jessica Stella



Susan Tyree



Melody Watson



Lisa Woodward

Melissa Adams-Cauble, (not pictured) an independent member from Region 5, is now Accounting Manager at Sussman Shank LLP in Portland, Oregon.

Michele Bailon, member of the Mile High Chapter, is now Office Administrator at Akerman LLP in Denver, Colorado.

Janice Chaffay, an independent member from Region 1, is now Director of Finance & Administration at Rubin Thomlinson LLP in Toronto, Ontario.

Kerry McFarlane, an independent member from Region 3, is now Office Manager at Parker Harvey PLC in Traverse City, Michigan.

Dave Lentz, an independent member from Region 2, is now Chief Operating Officer at Fisher & Phillips LLP in Atlanta, Georgia.

Jeffrey McGillicuddy, member of the Boston Chapter, is now Director of Administration at Lourie Cutler, PC in Boston, Massachusetts.

Holly Pulido, member of the Austin Chapter, is now Administrator at Gray & Becker P.C. in Austin, Texas.

Dean Regan, member of the Greater Los Angeles Chapter, is now Office Manager at Barton, Klugman & Oetting LLP in Los Angeles, California.

Renee Ricken, (not pictured) member of the Metropolitan Detroit Chapter, is now Office Administrator at Pitt McGehee Palmer & Rivers PC in Royal Oak, Michigan.

Erin Ross, member of the Capital Chapter, is now Human Resources Generalist at Morgan Lewis Bockius LLP in Washington, D.C.

Jennifer Schwendemann, (not pictured) member of the Gateway Chapter, is now Senior Director & Associate General Counsel – Risk Management at Littler Mendelson, PC, in St. Louis, Missouri.

Nina Sharpe, member of the Atlanta Chapter, is now Firm Administrator/Chief Operating Officer at Solano Law Firm, LLC in Atlanta, Georgia.

Desiree Shestakofsky, member of the Oregon Chapter, is now Office Manager at Duffy Kekel LLP in Portland, Oregon.

Jessica Stella, member of the Gateway Chapter, is now Director of Administration at Spencer Fane Britt & Browne LLP in St. Louis, Missouri.

Susan Tyree, member of the Alaska Chapter, is now Administrator/Officer Manager at Sonosky Chambers Sachse Miller Monkman, LLP in Anchorage, Alaska.

Melody Watson, member of the Capital Chapter, is now Human Resources Manager at Wilkinson Barker Knauer, LLP in Washington, D.C.

Lisa Woodward, member of the Austin Chapter, is now Office Administrator at Thompson & Knight LLP in Austin, Texas.

CHAPTER HIGHLIGHTS

The Boston Chapter gets a shout-out: *Massachusetts Lawyers Weekly* featured a photo spread in its September 25 issue about the chapter's recent One-Day Leadership Conference & Business Partner Expo. Chapter members, business partners, area ALA members and industry guests mingled at a social and an Exhibit Hall. On the education side, four speakers touched on different aspects of leadership in their sessions.

Boston Chapter member Megan A. Pluviose, Office Administrator with Jones Day, says the event was an enormous success. "Attendees laughed, cried and were encouraged to reach a higher level of thinking about leadership and impact. Participating in one of the Jon Petz's magic tricks was a delight." The chapter is already planning another event for September of next year. "We're looking forward to raising the bar even higher!" Megan says.

See the online version of this article to see the photo collage.

Check out the Philadelphia Chapter's latest video: Head to YouTube to hear the chapter leaders' insights into attending ALA's Chapter Leadership Institute (CLI). Their channel features other videos about ALA experiences and membership benefits. Just visit www.youtube.com and search "ALA Philly."



FOUNDATION DEVELOPS PLANS FOR ADMINISTRATIVE PRO BONO PROGRAM

The Foundation of the Association of Legal Administrators has begun to develop plans for an exciting new initiative called the Administrative Pro Bono Program. The program is intended to match the needs of legal services organizations (LSOs) with the skills and expertise of our members, business partners and firms. ALA members can offer HR, financial, IT, marketing and other expertise that these organizations need.

The Foundation is in the early stages of the planning process and wants to understand better the level of interest from ALA members to assist in determining how it should structure the program. If you would be interested in participating in such a program, visit alanet.org/about/about-ala/foundation/administrative-pro-bono-program. Indicating interest does not obligate you in any way.

IN MEMORY

Our condolences to the family, friends and colleagues of **Ian Turvill**. He passed away in October. The Chief Marketing Officer at Freeborn & Peters LLP in Chicago, he was a member of ALA's Greater Chicago Chapter and the Treasurer on the Board of Directors of the Legal Marketing Association.



One Member's Personal Quest to Help Puerto Rico



Nate Hendricks (far right in the hat) stands with some of those he delivered aid to in Barrio Cielo.

For Nate Hendricks, helping Puerto Ricans rebuild after Hurricane Maria is personal. In 2016, Nate — who is the Administrator with Burnett, PA, in Lakeland, Florida, and a member of the Suncoast Chapter — formed the Puerto Rico Legal Project, a nonprofit legal and social services clinic that supports the legal needs of low-income residents on the island.

"I made friends in the Puerto Rico legal community by a random chance in Old San Juan," says Nate. He sat next to a couple of lawyers on the same park bench. "We began talking about the poor situation of the economy of Puerto Rico and how most people can't afford legal help when they need it." From that conversation, the Puerto Rico Legal Project was born.

But once Hurricane Maria hit, he knew he had to help in another way. "I was getting calls daily from friends and clients of how bad it is down there, and being [trained as] a firefighter [and] having been through multiple hurricanes, I knew that I needed to jump in and help."

His first trip there after the hurricane was sobering — what he saw was utterly apocalyptic. He was reaching interior

towns that in some cases hadn't received any aid yet. He began personally delivering supplies to make sure they got where they were needed. He's also personally donated EMT supplies and rescue firefighting equipment, and he's provided swift-water rescue training and first-aid classes for the smaller, inland fire departments. The town of Cidra made him an honorary firefighter — complete with badge.

"Things are still really bad there, but people are doing their best to stay positive," says Nate. "Every day I get calls for help to some new community that does not have supplies. It's hard work but worth it, as each individual person we help makes it important."

The legal clinic's office has power again, so he's now working to prepare education plans for hurricane and storm preparedness and offer free assistance processing FEMA and insurance claims.

The clinic is funded through donations, and they've created a separate fund just for Maria-related aid — all contributions go directly to buying and shipping supplies.

"We have raised almost \$25,000 on GoFundMe (www.gofundme.com/prlegalproject-org) and \$26,000 from direct donations. Almost all of the donations have come from the legal community," he says. The clinic also accepts donated supplies to ship; for instance, they recently received 200 cases of water from a law firm that they sent to the island.

To contribute to the project — or to specifically help their Hurricane Maria recovery efforts — visit www.prlegalproject.org. ■

HAVE A VOLUNTEER STORY TO SHARE?

We want to hear about it! Send us an email at publications@alanet.org.

What's Happening at Headquarters?



GET ANOTHER YEAR OF EDUCATION, RESOURCES AND NETWORKING OPPORTUNITIES

Law office management is a uniquely challenging field. ALA provides resources to expand your knowledge, grow as a leader and connect with colleagues and industry leaders, which helps you succeed in your chosen career and your firm remain competitive. Seize the exclusive benefits of membership for the January 1–December 31, 2018, period by renewing your dues now: alanet.org/membership/case/benefits.

Members will be emailed a personalized web address that makes it easy to renew their dues online. Otherwise, log in to my.alanet.org, click on “My Account” at the top of the webpage and view “Account Details.” From there, head to the “My Dues & Financials” tab.

ANNOUNCING NEW DIVERSITY AND INCLUSION RESOURCES

The Diversity and Inclusion Committee is helping the ALA and the legal community recognize the importance of diversity and inclusion and implement initiatives for more diverse and inclusive workplaces. It revamped and consolidated resources to form a starter kit for organizing a diversity and inclusion committee or special interest group at the chapter level. The committee also created a list of speaker tips to help members craft better presentations on diversity and inclusion — as well as general topics — for ALA events and their daily work lives. To access these resources, visit the web version of this article.



2017 COMPENSATION AND BENEFITS SURVEY NOW AVAILABLE

Want to know if your firm's compensation packages are competitive? Wondering what you could be paid in a different region? Curious about trends in benefits? Thinking of hiring a Cybercrime Director/ Specialist and need to find out the industry-standard salary? The information you're searching for lives in this year's comprehensive report, which features data for more than 60 positions in more than 40 metropolitan areas. Visit alanet.org/education/research/compensation-and-benefits-survey for more details.

CONTRIBUTE TO AN UPCOMING ALA CONFERENCE

Do you have ideas that legal management professionals would find useful? Have you heard a speaker who would wow attendees at ALA's 2018 and 2019 conferences? Does a colleague need a nudge to share their business of law expertise with a wider audience?

Let ALA know — we're looking for presentations to wow attendees at our 2018 and 2019 conferences.

Learn more and submit a proposal: alanet.org/cfp.



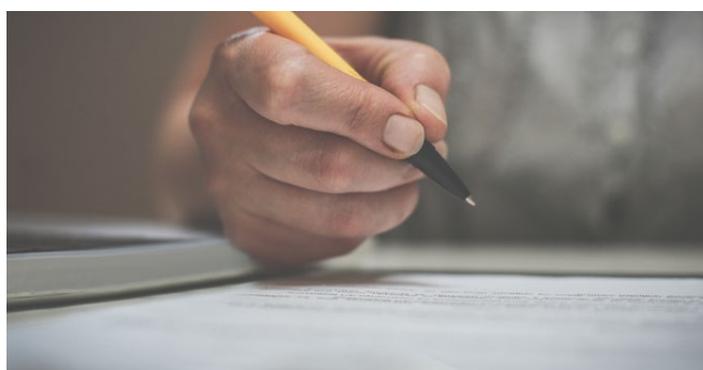
THE *LEGAL MANAGEMENT TALK* PODCAST IS BACK

On this episode, we talked with Corey Saban about the promotional and engagement powers of web video. A Vice President of TheLaw.TV, he'll be a speaker at the 2018 Annual Conference & Expo.

Download the episode in iTunes or visit alanet.org/podcast.

LOOKING FOR YOUR GREAT IDEAS

The fifth annual IDEA Awards will highlight incredible, outside-the-box initiatives led by members, chapters, committees, business partners and firms. The program is intended to recognize new practices in the realms of innovation, development, engagement and advancement. Submissions are due January 12: alanet.org/about/about-ala/member-recognition.



PREPARING FOR THE CLM EXAM OR RECERTIFICATION?

Recertification credits must be completed by November 30, and ALA will be accepting Certified Legal Manager (CLM)[®] applications starting January 1, 2018, for the May exam. Demonstrate to your employer that you have mastered — or kept up to date with — the knowledge, skills and abilities to operate at a high level of expertise in the field of legal management. Educational resources and application requirements can be found at alanet.org/clm.

THE MANAGING PARTNER-COO RELATIONSHIP

How can managing partners develop a productive relationship with their Chief Operating Officers? Recently, ALA Executive Director Oliver Yandle and John Remsen Jr., President of The Remsen Group, co-moderated a Managing Partner Forum webinar. They discussed how hiring — and valuing — a trusted, competent firm administrator can be a game-changer for managing partners and their firms. The panel included ALA's Gary T. Swisher II, CLM; Denise L. Gaskin, PhD; and their respective managing partners. To listen to the recording, see the web version of this article.



CALENDAR

NOVEMBER 23-24

THANKSGIVING

ALA Headquarters Closed

DECEMBER 7 | 2 P.M., CENTRAL

ANALYZE DATA QUICKER AND EASIER THAN EVER BEFORE WITH EXCEL PIVOTTABLES

Excel PivotTables have been around for more than 10 years, yet so few law firms use them effectively. Their usefulness exists for data analysis in litigation cases and financial analysis for partners. For anyone who works in Excel, PivotTables can literally save you hours of time every day. They allow you to adjust how you view data on the fly in seconds with just a few clicks. Best of all, creating a PivotTable is so much easier than you might think. This session will demonstrate practical examples of when PivotTables are useful and the basics of how to create one.

Questions about this event? Contact psiem@alanet.org.



DECEMBER 13

HANUKKAH BEGINS

DECEMBER 20 | 2 P.M., CENTRAL

DIFFICULT DECISIONS: WHEN ETHICS AND ORDERS CROSS

What do you do when a partner or superior gives a directive and you have an uncomfortable feeling that it isn't appropriate or conflicts with your personal or organizational values? What if it is flat-out unethical or illegal? Do you speak up or simply do as you are told? Does everyone in your firm know who to go to or how to handle a difficult decision? Will they act appropriately when confronted with unethical behavior? Ethical decision-making is a complex process, requiring moral awareness and judgment. Join this session to get help with these difficult decisions and receive a framework for effective ethics management.

Questions about this event? Contact psiem@alanet.org.



DECEMBER 25

CHRISTMAS DAY

ALA Headquarters Closed

DECEMBER 26

KWANZAA BEGINS



2018

JANUARY 1 HAPPY NEW YEAR!

ALA Headquarters Closed

JANUARY 4 | 2 P.M., CENTRAL HOW TO TELL WHEN SOMEONE IS LYING

Are you winning the game of Two Truths and a Lie? You play every day and don't even know it. Detecting lies is crucial in business and life. Do you know if your clients really like your proposal? Do they like the job you did? Are they telling you the truth about their budget? Are they telling you all of their needs? Are the people you're interviewing inflating their résumé? This program uses videos from current events to demonstrate techniques. To apply the learning, we'll play Two Truths and a Lie.

Questions about this event? Contact psiems@alanet.org.



JANUARY 11 | 2 P.M., CENTRAL BUILDING EFFECTIVE MENTORING PROGRAMS

One of the best ways to help develop and retain your valued employees is to have them work with a skilled mentor. Many firms have created programs to facilitate the creation of mentoring partnerships, but the programs have not always delivered the desired results, leading to frustration for both mentees and mentors. However, mentoring programs can be rewarding if they are designed well from the start. This session will examine current research on mentoring programs and will detail how firms can get the most out of them.

Questions about this event? Contact psiems@alanet.org.

JANUARY 12 ALA BOARD OF DIRECTORS MEETING Chicago, Illinois