

# LEGAL MANAGEMENT

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As more clients dictate e-billing processes, legal organizations of all sizes will need to get acquainted with outside counsel guidelines.





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“  
But look at what our  
members and profession  
have stepped up and  
done. We have learned  
that we can move through  
obstacles and challenges  
with grace and wisdom.”

## Don't Look Back — You Aren't Going That Way

**You know that old saying, “don't look back, you're not going that way”? It's taken from an anonymous poem. If I had a dollar for every time I have read it, heard it or said it, I would no longer be in legal management. If you Google the quote you will find over 3 billion (yes, that is a B) results. You can find this message on everything from keychains to pillows to book titles to Bob Dylan documentaries. It's a mantra — a message, a forecast.**

That's not to say we don't look back. We revisit and question and wonder if we have done, said or provided the “right” things. It is a habit that we have developed over the years — it is so easy to look back and judge. And looking back isn't always a terrible thing. (You would be a terrible driver without a rearview mirror, after all.) If we don't look back and reflect, we would be unable to gauge how much we've grown.

The experiences of the past year with a pandemic and social injustice made us participants in this thing called life, allowing us take the time to reflect. It is a great time for exponential personal and professional growth — if we are not stuck looking backward. It has been a once-in-a-lifetime opportunity to rethink and reframe, but I'd like for us all to pause and ask ourselves: Are we answering the call?

Would you have believed a year ago that you could have managed your legal organization through a pandemic that made the world stand still? I am guessing the answer is a hard no. But look at what our members and profession have stepped up and done. We have learned that we can move through obstacles and challenges with grace and wisdom. We learned just how much we can rely on one another to assist us in being our best.

As I come to the end of my presidential year, I fight the urge to armchair quarterback. I feel the need to redo, reorder and reprioritize. But as is the case with each of us, we

make the best decisions we can with the information we have at the time. However, I am reminded that we can change through our choices going forward, or we can rinse and repeat. We can judge and rank our actions in the past, or we can choose to reflect and improve.

It has been my pleasure to serve as your President this past year. I have missed seeing your faces outside of my 2-by-2 square on my computer monitor, but I am still grateful for the ability to “see” so many of you. I managed to work my day job in Indianapolis and attend a conference in California all in the same day. I was able to attend educational opportunities in my leggings with messy hair. I attended a holiday play in Jacksonville at lunch and went to my husband’s local basketball game that evening. I had dinner with my family and attended a wine tasting in Chicago all within an hour. I talked in Boise during the day and still drove home in the evening. I dropped in on so many chapters and connected with members I might not have had the opportunity to meet. So many more opportunities were afforded me because of the pandemic — or maybe in spite of it!

I have had the opportunity to work with some of the best people in this Association. I am in awe of our Board of Directors, with their great minds and servant leadership attitudes. I have been amazed by our staff and their ability to pivot when plans did not go our way. I am thrilled with the business partners who have stood by us in a less than optimal year.

As the Association is headed into a new strategic plan and new leadership is at the ready, I am excited about the future — the future of this Association, the future of the legal profession and the future of each of you.

So don’t look back: reflect. You aren’t going that way — you are going forward! While rearview mirrors do serve an important purpose, and you should always drive forward with them in mind.

 [Debbie@threlkeld-legal.com](mailto:Debbie@threlkeld-legal.com)

# Happy 50th Birthday ALA

ALA turned 50 on March 4, but we are celebrating our birthday all year. Whether you were part of the organization in the 1970s or just joined yesterday, you can enjoy the many ways we will recognize five decades of upholding the value of the legal management profession and providing professional development, networking and resources. Check out our interactive timeline, photos, stories and other features and join the celebration.



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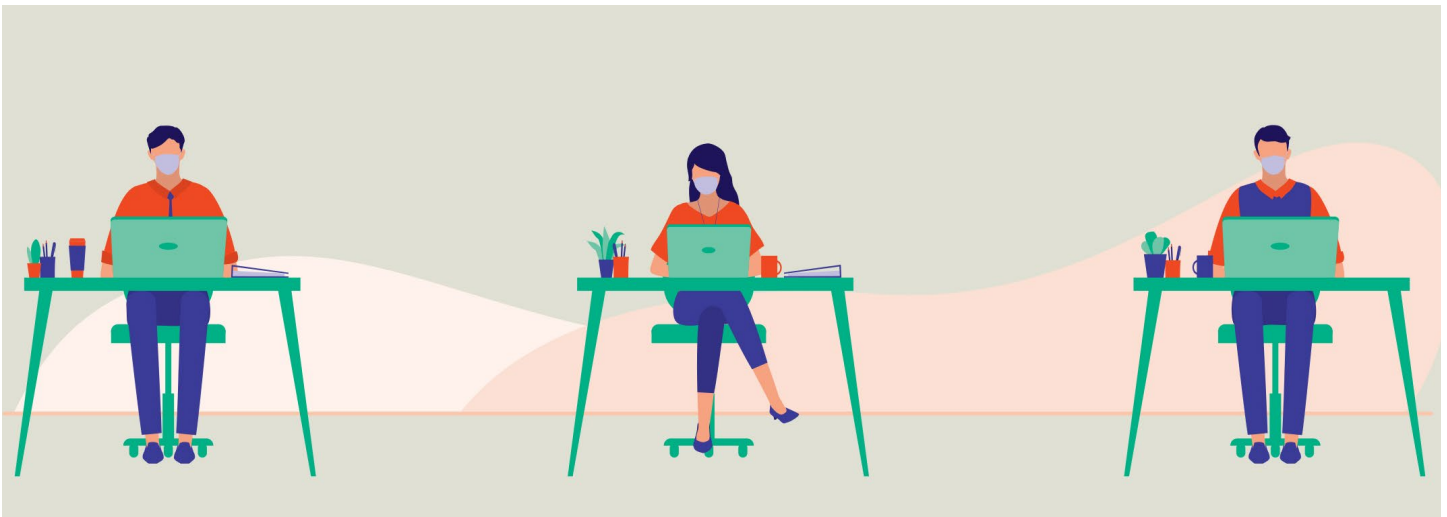


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## Pandemic Liability Protections Aren't Immunity

**Demonstrating proof that your law firm has complied with all applicable COVID-19 workplace safety protocols will be critical to a defense against lawsuits, insurance claims and affordable liability insurance coverage in the new normal. Like any risk management strategy, understanding the when, why and how can be daunting — especially in a scenario like an unprecedented pandemic, when guidelines and regulations were ever-changing and differed from state to state.**

“One of the biggest obstacles law firms — and many businesses — face in addressing this critical attention to detail is bandwidth.”

Even though many states have enacted liability protection laws, it doesn't necessarily mean there is complete immunity from potential lawsuits. Furthermore, insurance underwriters are tightening qualification requirements for businesses that are contracting and renewing general liability insurance. It is crucial to verify and document proactive measures taken to protect the workplace and the community as a whole. Some businesses we've worked with have admitted they fear a review and audit about what might have been missed. Below are challenges we see and how to begin rectifying them in your own legal organization.

### PANDEMIC APATHY AND FATIGUE

March marked one full year since the pandemic began wreaking havoc on operations in law firms and businesses of all kinds. Employees and business leaders are simply tired of dealing with the added burdens and feel they've done everything they could to prevent workplace exposure. Unfortunately, this is not sufficient for defending a lawsuit in case there are exposures. This leads to the fear that many leaders experience when approaching an audit of protocols enacted in their own workplaces.

## FEAR OF THE UNKNOWN AND WHAT PROTOCOLS MAY HAVE BEEN MISSED

Even if your organization has done nothing, rectifying missteps or other noncompliant actions can help counter any assertions or claims that there was a direct intention of harm by the organization's failure to act. If your firm is already documenting protocols that were taken, this will help leaders recognize and immediately correct any action items they missed. Again, it helps solidify that the organization was not failing to act intentionally.

Things that should be documented include health-screening protocols, policies, personal protective equipment requirements, disinfection regimens and social distancing measures. Firms should also document what employee communications plans they developed, what return-to-work policies look like and any sick-leave protocols that they have changed or created during the pandemic.

## LOCAL GUIDELINES AS MOVING TARGETS

Especially for law firms that have multiple locations across the country, knowing and having documented regulations and guidelines for particular states can be challenging. This challenge is further compounded by the fact that these state-by-state regulations and timelines have changed throughout the pandemic and can be difficult to accurately locate. Administrators in law firms who are worried that a well-planned safety strategy may not address an individual state's recommendations should document as much background as possible and continue to do so until the pandemic has subsided.

## INTERNAL BANDWIDTH DOESN'T SUPPORT THE DETAILS REQUIRED

One of the biggest obstacles law firms — and many businesses — face in addressing this critical attention to detail is bandwidth. Legal managers and operations leaders already have a robust

list of day-to-day tasks that make this increased focus overwhelming. Whether you choose to hire a part-time role or engage a third-party business partner versed in change management, regularly documented protocols and a solid plan to follow will pay dividends if and when a lawsuit is filed.

Legal teams and risk management experts know there are often surprises along the way, but they also know that preparing for the worst and having accurate records can help alleviate future stress, ensure compliance and ease employees' minds about the health and safety of their workplace. It's also valid that many firms may not have the administrative bandwidth to make this kind of record-keeping possible in the capacity it requires. The challenges the past year has created, especially for large firms with multiple locations, may require a consulting firm. Choosing to document more thoroughly and developing a plan — or hiring a consultant — isn't an admission of guilt but a powerful, proactive response to ever-changing situations in our current business environment.

### ABOUT THE AUTHOR

**Dave Luter** is a Consultant with more than 29 years of experience in information technology management and business process reengineering. His experiences have been split between health care, the public sector and manufacturing/distribution in both industry and consulting environments. Luter's expertise includes project management, business development, workflow analysis, data capture/analysis, systems design/development, web design/development and implementation of clinical applications. He also has an in-depth knowledge of hospital operating room procedures centered on the design, development and analysis of reporting metrics.

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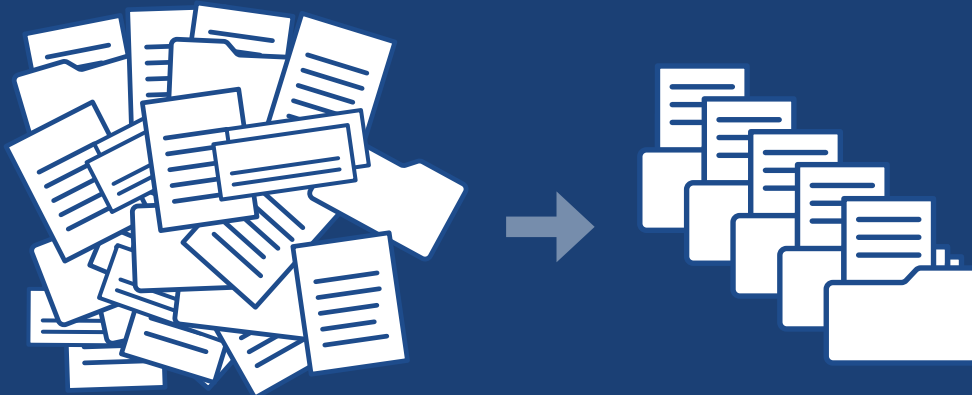


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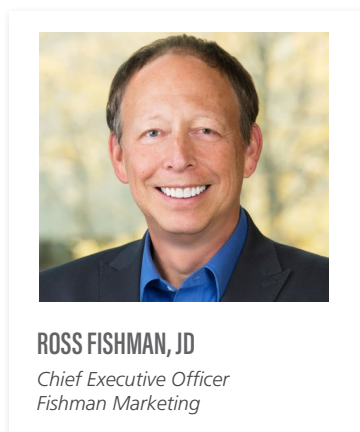
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**ROSS FISHMAN, JD**  
Chief Executive Officer  
Fishman Marketing

“What makes your program so compelling that your targets will choose it over the many others offered on similar topics?”

## 7 Marketing Tips During COVID-19 and Beyond

It's been a year, to say the least. With the lessons learned over the last 12 months, your legal organization can be in a prime position to reach clients. These tips can help.

### 1. This Is the Era of the Service Partner.

The COVID-19 era is the time for service partners and senior associates to shine. The traditional glad-handing skills of gregarious rainmakers are of limited use when few people are willing or able to go out to lunch or a ball game and in-person conferences have all been canceled.

Today's COVID-19 economy plays to the strengths of the second-tier lawyers — the skilled service partners or senior associates who, although they may not be as overtly charismatic, are solid professionals who keep clients satisfied with competent technical work and dedicated client service.

They are reliable, trustworthy and hardworking — all the things clients need at this difficult time. I think 2021 should be their breakout year. Lawyers possess the skills and training to help people who truly need it. Be proactive in offering that valuable assistance to them.

### 2. Contact Your Best Clients.

Throughout the pandemic, every lawyer should be regularly contacting their clients simply to ask, “How are you doing?” or “How can I help?” Reach out with sincerity and authenticity to truly seek to help them through this turbulent time. Clients appreciate a lawyer who regularly contacts them to bring them new ideas and solutions to the types of problems that companies like theirs are experiencing.

The light at the end of the COVID-19 tunnel is in sight, so businesses will be restarting, returning in person, bringing back employees, seeking new funding and reorganizing their finances. Find ways to become their trusted adviser. Clients regularly say that they like lawyers who can help them look down the road or “see around the corner.” Be the firm that has those lawyers.

### 3. The More *They* Talk ...

Two of my favorite studies explain that in a networking or client-development situation, the more the *prospect* talks, the more they A) like you and B) the smarter they think *you* are!

That is, in the 80/20 rule of communication, the prospect is doing 80% of the talking. You are doing just 20%, most of which is asking well-researched questions and even more insightful follow-ups. This demonstrates your expertise and technical skills, while also leading them to identify areas where they may need your legal help. Today, when we rarely meet face to face, using this strategy on Zoom can help foster or strengthen the relationships you value.

### 4. Your Webinars Cannot Be “Fine.”

Our target clients have innumerable options for educational programming and webinars. According to a survey conducted by Baretz & Brunelle, a leading legal public relations firm, the 100 largest U.S. law firms produced nearly 1,300 webinars in the second quarter of 2020. According to a Vanderbilt Law School study, prominent clients may get as many as 250 webinar invitations per day.

With seemingly infinite educational options, what makes your program so compelling that your targets will choose it over the many others offered on similar topics?

During webinars, where an attendee can silently disappear with a single click, the speaker cannot afford to be dull for even the briefest amount of time. The most important metric to me when presenting a webinar is how many of the original attendees are still in attendance at the end of the session. We must all work even harder to ensure that not only is our material technically accurate (obviously), but that the speakers’ performance must also be compelling or entertaining.

### 5. Update Your Biographies.

When we can’t be together in person, little things matter more. If we can’t evaluate someone face to face, we rely more heavily on the online information. Nearly everyone considering hiring you or your lawyers will first conduct a Google search for their name and visit both their website biography and LinkedIn profile.



This makes it even more important to have updated and persuasive profiles. I always recommend that lawyers update their biographies on the firm’s website at least every three to six months. This is especially important these days when prospects are looking for certain skills that did not previously exist. For example, if you earn experience in Paycheck Protection Program (PPP) funding or COVID-19 counseling, you should add it immediately to all your online biographies and profiles. If this is not detailed in your bio and LinkedIn profile, prospects searching for that new skill set will not know that you possess it.

### 6. Thank Clients in Writing.

When you close a file, write a short handwritten thank-you note. I was moderating a general counsel panel in 2019 when a Fortune 500 general counsel stated: “In 10 years I’ve never received a single personalized thank-you card, even after multimillion-dollar engagements.” It’s not that she expected this, but rather that she felt it sure would be nice for one of her valued lawyers to show some sign of appreciation for the significant business she is bestowing upon their firm.

Today, personal touches like this are more important than ever. It only takes a few minutes to dash off a quick personalized note, and their infrequency makes them much more impactful and meaningful than a simple email or text.


## 7. Branding Is Particularly Important Today.

During stressful times, consumers opt for trusted brands. Branding can be a firm's most powerful tool when undertaken persuasively and effectively — even more so today when our impressions are being formed online. Consider your website, the first place many clients and prospects will visit before hiring you. Does it showcase your firm in its most positive light? Is it unique and persuasive? Does it tell me something about your firm I didn't know, or is it interchangeable with all of your lookalike competitors?

Remember, prospects visit your website at a particularly critical time in the hiring process. They have found you online or heard good things about you from a referring client or lawyer. It is this time when you have the opportunity to truly stand out from your competition. Failing to do so is simply marketing malpractice.

### ABOUT THE AUTHOR

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

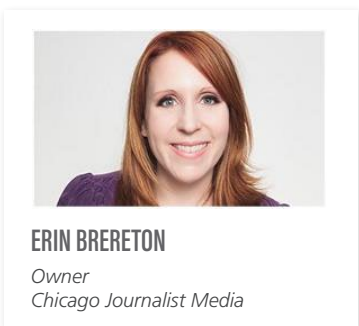
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ERIN BRERETON

Owner  
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## The State of the Summer Experience

*Unprecedented workplace changes affected summer associate programs nationwide last year. Find out how the industry reacted — and what this year’s efforts may look like.*

**For law school students, law firms’ summer associate programs essentially act as an extensive, detailed job interview — offering students real-world experience and both parties a chance to gauge if they’d be a good fit for each other.**

“We’re also seeing firms continue to do social events over Zoom so people have an opportunity to really get to know their colleagues. Tours and setting up outside social interactions can possibly help firms get over the virtual hump.”

Last spring, however, as the COVID-19 pandemic unfolded and offices transitioned to working remotely, a number of firms had to adjust, pause or otherwise alter their summer program.

“[The response] was all over the map because law firms were scrambling to figure out if they could even still have a program,” says Emily Neuhauser, Executive Recruiter at Parker + Lynch Legal, the attorney recruiting division of Special Counsel. “Some canceled them entirely, some firms were still comfortable having them in-person, and some had them virtually.”

Last year, Florida business law firm Berger Singerman pushed its summer program start date back slightly and let the two participants choose whether they’d work remotely or on site, according to Partner Stephanie Chaissan, who runs the firm’s summer associate program, where social distancing, mask and other guidelines were in place.

“Around the time they joined us, a handful of people were going into the office, but the vast majority of attorneys and support staff were working remotely,” Chaissan says. “We said, ‘This is a global health pandemic; we’re treating you the same way as the rest of our team members — if you want to, work in the office; if not, work from home. Whatever makes you more comfortable.’”

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“[With] the time and financial advantages, virtual interviews are probably here to stay. ... It has opened up the whole world to people — because if you are interviewing or working virtually, you could come from anywhere.”

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Although the summer associates occasionally worked remotely, she says, they primarily wanted to be in the office. The firm, which usually tries to recruit younger associates and team leaders to take summers out to lunch and coffee and to walk them around to meet everybody, scheduled Zoom and Microsoft Teams calls to introduce its summer hires to firm members who were working from home.

“They did meet-and-greets with everyone from main partners and team leaders to the paralegals and computer services people,” Chaissan says. “We wanted to them to connect the way they would have, had they been in the office seeing these people.”

## NOT UP CLOSE, BUT PERSONAL

New York- and New Jersey-based Rivkin Radler — which typically hosts three second-year students and three or four first-year students — brought on a slightly smaller summer associate group in 2020. It consisted of three second-year and two first-year law school students.

The 200-attorney firm’s summer program typically lasts 10 weeks. Rivkin Radler instead offered a fully virtual five-week program in 2020, according to Tracey McIntyre, Director of Legal Talent.

“We just weren’t sure how a virtual program would go, how busy the firm would be and what effects the pandemic would have on our firm,” McIntyre says. “We erred on the side of caution, and in hindsight, a longer program would have been fine.”

The biggest difference from previous years, McIntyre says, was that summer associates weren’t able to walk the floors and meet some of the attorneys they weren’t directly working with.

“Under normal circumstances, additional assignments and experience can come from these impromptu discussions,” McIntyre says.

To help provide a robust summer experience, the firm offered a number of activities, including skills trainings, coffee talks with equity partners and “what we do”-type programs, in which firm members discussed their practice areas, the types of matters they handle and what kind of clients each works with.

Rivkin Radler also sponsored a number of Zoom-based social events, including virtual Thursday cocktail hours and a virtual scavenger hunt.

While Berger Singerman’s two summer associates got to briefly socialize with team members at the firm’s pre-pandemic 2020 holiday party — which they were invited to after being offered the position in 2019 — the firm’s monthly happy hours, birthday parties and many other of its team culture efforts had to be put on hold due to COVID-related guidelines and shutdowns.

Social events were generally limited to things like a small pizza party that remote employees were invited to attend virtually. “That was a big component of our program that was affected by the pandemic, unfortunately,” Chaissan says. “We encourage a good work-life balance. We all approach the firm as a team and a family, rather than just a workplace to go and have colleagues. It’s something we try to show all summer long because it sets us apart from [other] firms.”

Fully or hybrid remote settings can make it harder for people feel like they’re truly joining an office, according to Neuhauser. Some organizations, though, have come up with creative ways to entice new hires to their firm.

“For example, a client of mine decided to record a couple of different virtual tours of the office [as if to say], ‘If you do come here in the future, this is where you’ll be,’” Neuhauser says. “We’re also seeing firms continue to do social events over Zoom so people have an opportunity to really get to know their colleagues. Tours and setting up outside social interactions can possibly help firms get over the virtual hump.”

## THE BRIGHT SIDE OF BEING REMOTE

Having summer associate programs be partially or completely virtual has provided some unexpected advantages. With firm members working remotely, interns at Berger Singerman, for instance, were given prime seating in a partner and an associate’s office, placing them closer to Chaissan in case they had any questions.

The various communication solutions the firm had in place to facilitate collaboration may have helped showcase the firm as a tech-forward organization, Chaissan says. Seeing the way hearings, depositions and other litigation aspects were being handled virtually may have also helped prepare summer associates for any future process changes that come from the pandemic.

“Summer associates saw that we’re on top of the latest developments in the legal and legal tech industry and have taken advantage of that to make the effect of the pandemic as minimal as possible,” Chaissan says. “To the extent Zoom hearings continue after you pass the bar, you know you have a leg up because you did it for a summer.”

Rivkin Radler found the revised on-campus interview process law schools instituted due to COVID-19 helped facilitate summer candidate screening.

“In a typical year, we interview second-year students at the end of July/beginning of August,” McIntyre says. “Due to the pandemic, the law schools pushed the on-campus interviews to late January/early February. We interviewed all candidates virtually, which made for a very fast recruiting season, as travel was not involved to bring people in the door.”

## ADAPTING TO THE NEW NORMAL

This summer, a number of firms are hoping to return to their pre-pandemic format as much as is possible. Rivkin Radler, for instance, intends to include one more first-year student than last year and, as of mid-March, was planning to have its summer associates start out working virtually in June.

If the firm’s return-to-office committee decides it’s safe for all employees to begin working on site again during the six-week summer program, the associates would transition to coming into the office.

“A lot of firms are having associate programs this year,” Neuhauser says. “We’ve seen some have already called it off for the same reasons; we’re also seeing an interviewing process that’s totally different because people couldn’t meet in person as freely.”

Candidates, Neuhauser says, may actually find the new interview system advantageous, since the age group grew up with significant exposure to technology and should be comfortable using the tools involved in both interviewing and working remotely.

Firms and in-house departments, too, can benefit from using virtual summer associate program elements on an ongoing basis — saving firm members from having to take time out of their day to trek to a campus for an in-person conversation and enabling organizations to look for candidates outside their traditional market, Neuhauser says.

“[With] the time and financial advantages, virtual interviews are probably here to stay,” Neuhauser says. “In the past, a lot focused on local schools in your market. We might see some changes in where people are coming from or where they’re sitting in the future. It has opened up the whole world to people — because if you are interviewing or working virtually, you could come from anywhere.”

### ABOUT THE AUTHOR

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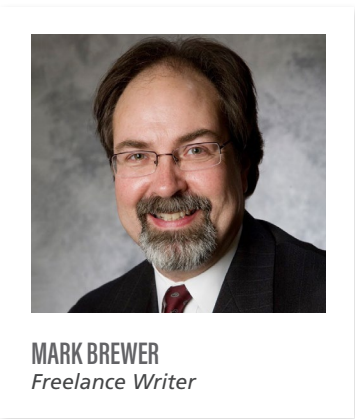
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For me, it was one of those things I never gave much thought to until it was in front of me to manage. At that point, it’s almost too late. Unless you’ve thought about it and anticipated it, by the time it gets to you, you’re probably already behind the ball.”

# Who’s the E-Billing Boss? Likely Your Client

*As more clients dictate e-billing processes, legal organizations of all sizes will need to get acquainted with outside counsel guidelines.*

**Pop quiz: Who controls legal billing and case management: the law firm or the client?**

If you picked “the law firm,” you may be in for a surprise. That’s because more companies are looking for ways to optimize their legal spend by dictating payment terms to law firms.

It all started in the 1990s when the in-house legal departments of big insurance companies and banks decided to take more control over their legal budgets, particularly for commoditized services like general liability. By specifying requirements for invoicing legal services, these companies wanted to cut costs, get better service and make better decisions about what to outsource. Specifically, they wanted to avoid:

- » Spending beyond the authorized budget
- » Duplicated time charges
- » Billing for disallowed expenses
- » Inefficient work delegation, such as under- or overqualified attorneys working on matters
- » Excessive bundling of tasks and vague work descriptions

Clients communicate billing requirements through outside counsel guidelines (OCG), a document that defines what the law firm can or cannot bill for, how much can be billed for specific services, the experience level of attorneys working on matters and many other aspects related to quality, cost and delivery. OCGs can also put caps on certain types of legal work and law office activities that can be billed for and disallow certain miscellaneous expenses.



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“Getting discipline on all aspects of billing — from capturing billable time, feeding it into the e-billing system and then billing and collecting — all these steps need tightening up, because the result is pure profit.”

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As a result, more clients are driving the billing process.

“Sophisticated consumers of legal services are definitely in the driver’s seat and dictating billing practices,” says John Remsen Jr., President of The Remsen Group and an expert on law firm management. “It’s something clients have been driving for a long time. Insurance companies in particular are brutal when it comes to coding, auditing and monitoring your bills. It’s done their way, to their specifications.”

It’s something legal managers of all firm sizes are going to need to become familiar with, says April Campbell, JD, ALA’s Executive Director and a former administrator and operations director for law firms of various sizes, as businesses with as few as 200 employees are now considering e-billing. “It’s no longer just the big corporations that have OCGs and billing requirements.”

## BIG RISKS

E-billing is nothing new, but its use is trending upward. “We continue to see an increase in corporate clients deciding to move to e-billing, and we’ve also heard that from our law firm clients,” says Marie Burgess, Senior Director of Product Management at Aderant, a technology company specializing in helping law firms navigate the e-billing landscape.

To enforce their guidelines, clients use automated e-billing portals. Firms submit invoices online and the e-billing system reviews each line item, rejecting anything out of compliance.

The big risk is in the rejections. By not complying, law firms risk getting paid late, not getting paid in full or not getting paid at all. Law firms can appeal rejected line items or short payments, but that can take time — further delaying, or possibly forfeiting, payment. Unfortunately, many law firms absorb these rejections as part of the cost of doing business rather than organize their billing processes around compliance.

Besides enforcing compliance, e-billing gives companies more visibility into their legal spend, the work delivered and the ability to compare the quality and cost of service among their law firms. As an automated system, e-billing is also used to extract data for analysis. Clients review billing data to track several metrics to help them compare firms and individual lawyers by type of matter and jurisdiction. Common metrics analyzed can include the time from case opening to close or average settlement.

## A LACK OF AWARENESS

The main challenge with OCGs and e-billing is that many administrators, attorneys, managing partners and other stakeholders aren’t aware of the content or gravity of the guidelines.

“For me, it was one of those things I never gave much thought to until it was in front of me to manage. At that point, it’s almost too late,” says Campbell. “Unless you’ve thought about it and anticipated it, by the time it gets to you, you’re probably already behind the ball.” Then, the client is engaged and attorneys are working on the matter but may not be following the guidelines.

Not understanding client requirements up front has ripple effects downstream. Because OCGs can require capping time spent on cases, the number and types of attorneys authorized to work on specific matters, and even the diversity of the attorneys assigned to a case, having a full understanding of the OCG before starting work is crucial to maximizing revenue. For example, some OCGs specify that junior attorneys cannot work on certain matters. There may be a cap on how much can be charged for a deposition. Some clients don’t pay for photocopies. Charging for any of this may result in line items being rejected by the e-billing system.

Because rejections can be based on work descriptions and how matters are managed, attorneys need to be familiar with the OCG terms in order to manage and bill matters accordingly, ideally before the work starts.

And it’s not getting any easier. OCGs are getting bigger and more complex, with up to 100 pages of requirements for billing and other concerns such as data security. Clients may also change their requirements or change e-billing providers, forcing the firm to learn a new system.

In addition, Burgess says that companies currently using e-billing are becoming stricter with enforcing rules they may have let slide in the past. “There’s been more scrutiny and validation, and we’ve seen tighter deadlines and less leniency for exceeding a deadline, whether it be for appealing an invoice or submitting an accrual.”

## BILLING DISCIPLINE FOR PURE PROFIT

Large law firms have been working with OCGs for at least a decade and have the people and processes in place to handle e-billing. Some law firms have multiple billing coordinators with a person dedicated to each client.

But it's a different story for smaller legal organizations, which are not prepared for e-billing and don't have a process to fulfill them, says Campbell. Plus, they generally don't have ready resources to handle e-billing complexities. In this case, improving discipline around established billing processes can help smaller law firms ease the e-billing burden while maximizing revenue.

"I've observed law firm billing practices to be quite sloppy," says Remsen. "There are too many personalized processes. Attorneys can track time or bill any way they want. There are firms where lawyers write it out on a piece of paper and give it to the legal assistant, who may enter it incorrectly or code it to the wrong client." The result? "Firms are leaking cash like a sieve. If you're living on the billable hour, you need to get good at billing and become very efficient. Centralize the process. It's inefficient to have people billing different ways," he says.

Remsen adds that when a receivable becomes 90 days or older, the odds of collecting are low. "Getting discipline on all aspects of billing — from capturing billable time, feeding it into the e-billing system and then billing and collecting — all these steps need tightening up, because the result is pure profit," he says.

## CENTRALIZE THE BILLING PROCESS

To optimize revenue, experts agree that centralizing and standardizing billing processes is the best place to start. Campbell says OCG compliance starts with client onboarding and a conversation about billing requirements. "Often, firms are just happy to get the client in the door and don't have that conversation about the requirements," she says.

"It's best to fix these problems upstream. It's the age-old problem of getting attorneys to enter their time as they do their work," says Burgess. Compliance is often based on the work descriptions that attorneys provide during time entry, and these descriptions are analyzed by the client's e-billing platform. "If that's delayed or inaccurate — which is often the case — it ultimately leads to producing bills that don't comply with the OCG. Promoting real-time time entry with embedded OCG rule validation ensures compliance at the very first step of the process."

Even though firms are under pressure to cut costs, Campbell's advice is to hire a billing person: "Make sure you have the right

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"There's been more scrutiny and validation, and we've seen tighter deadlines and less leniency for exceeding a deadline, whether it be for appealing an invoice or submitting an accrual."

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staff to handle e-billing. This is one area that has a great [return on investment] because your bills get paid on time for the full amount."

Firms also need a communication process in place so that key stakeholders are aware of the requirements early in the client relationship. The firm billing coordinator can review guidelines and summarize them. "Pick the top things that are most important and make sure that anyone who bills on that matter or client knows what those are," Campbell says. Reducing the number of line-item rejections will save the firm time and improve cash flow.

## IT'S ABOUT THE RELATIONSHIP

Campbell emphasizes the relationship aspect of billing. A firm can spend months working on a project before the client sees tangible results. In the meantime, the invoice may be the only communication the client receives. "If you're not following the rules, that can be a source of frustration for the client," she says.

In the end, it's a matter of being prepared for e-billing before it turns into a revenue or relationship problem. Unless your firm's focus is on individuals and families, your next great client might deliver an OCG.

"Even if you don't have OCGs yet, think of a process you would use to be ready the first time one crosses your desk," Campbell says. "Because if you haven't seen an OCG yet, you will eventually."



### Learn More About Compliance Challenges

Join Aderant on April 14 for a webinar that discusses the outside counsel guidelines. (It will be available on-demand afterward here: [bit.ly/3ms8srK](http://bit.ly/3ms8srK).) Another team of Aderant experts also talked about strategies for accepting and managing OCG across the firm in a recent roundtable. A recording will be posted here: [bit.ly/3d0yizM](http://bit.ly/3d0yizM).

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## The Role Laterals Play in Succession Planning

*Succession planning can be a touchy subject for firms, but lateral hires can be integral to making it run more smoothly.*

**Lawyers can't work at their firms forever. Though many of them would like to, at some point, they will have to retire and pass the legal torch over to someone else.**

“On the client side, a lateral may have the requisite legal skills and personality to be the best person to take over legal work for a retiring partner.”

To ensure the longevity and success of their firms for years to come, lawyers will need to do succession planning. As legal managers, you know these conversations can be a struggle, but one way to move the process along may be to include lateral hires as a way to bridge the transition.

“Laterals help keep the continuity of the firm,” says attorney Ross Albers, Chief Executive Officer of Albers & Associates. “They help with the transition. They are the day-to-day people on the ground making sure that the firm continues to operate like it did before the succession.”

While laterals may not have played a role in succession planning in the past, today it's necessary that they're involved.

“It used to be that a homegrown attorney would be groomed to take over the practice,” says Ryan Reiffert, a business, corporate and estate planning attorney at the Law Offices of Ryan Reiffert, PLLC. “Nowadays, it's probably much more likely that a lateral (who writes one of the founders a check) will take it over.”

Since laterals are crucial in the transition, it's important to involve them in it. Here are some of the ways you can make sure that laterals have their say and assist you as succession plan.

## WHAT TO LOOK FOR

Law firms that are succession planning can think about involving laterals before they even start working at the firm. According to Jennifer Gillman, President of Gillman Strategic Group, when a law firm is recruiting a lateral, succession planning needs to be part of the conversation. For example, you could find out if the lateral has management expertise and leadership abilities that the current firm's lawyers and employees will embrace. Also, determine if the lateral has a certain reputation that's known in the marketplace.

"These qualities are especially important if the firm does not have anybody from its current roster to take over," Gillman says. "On the client side, a lateral may have the requisite legal skills and personality to be the best person to take over legal work for a retiring partner."

They also bring a fresh look at the overall functionality of the firm, which can prove to be quite valuable. Laterals don't have tunnel vision from working at your firm, so they can give you some useful and honest insight into how your firm operates.

"Have them observe the functioning of the office and then ask them about what they noticed," says Jonathan Cohen, an attorney and Cofounder at Cohen & Winters. "Leave room for their suggestions and recommendations from an outside/fresh perspective."

Albers agrees and suggests having a conversation with your lateral hires to get their perspective on what's working and what's not. "Ask them if they have any ideas on how to improve the practice. They've probably had many ideas but either never felt comfortable telling anyone or were told 'no.' Laterals will tell you what's really going on."

## GET ALL PARTIES TALKING

Retiring lawyers should be involved at every stage of succession planning. That's why it's critical to create dynamic and open communication between the laterals and retiring attorneys, says Cohen. "Keep expectations clear and stay open to any suggestions."

Cohen adds that clients need to be informed of laterals' arrival as early as possible so that they are in the loop as well.

If you identify a lateral as the successor, then you need enough time to train them to take on all these new responsibilities. "If you are unable to do this, it is unlikely the transition will go without any hiccups," says Todd Turoci, Founding Attorney of the Turoci Bankruptcy Firm. "But if you make sure you leave a reasonable amount of time to train the successor, the change will be much smoother."

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"Laterals help keep the continuity of the firm. They help with the transition. They are the day-to-day people on the ground making sure that the firm continues to operate like it did before the succession."

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You could involve the retiring lawyer by asking their opinion on who they think their successor should be. Turoci says ideally, the retiring attorney will assist their successor by training them and introducing them to key clients so that there is a prior relationship before transition.

If an attorney is reluctant to retire, you could set them up with a shadow lateral, says Cohen. "This may give them some excitement about sharing their hard-earned experience with a younger attorney and plant the seed of retirement."

Then, it's like a mentoring situation where the retiring lawyer could impart some wisdom and lessons learned. "Laterals should take advantage of the opportunity to learn from the retiring lawyers. They should consider the things they would like to emulate and the things they would maybe like to change," says Cohen.

Above all, leave yourself time — it's the one resource you can't get more of. Bring laterals and retiring lawyers together long before you need the succession to actually occur. Albers says that succession plan conversations can take over a year or longer to become a reality and that sometimes, attorneys wait too long to begin thinking about their plan.

"I recommend having a three- to five-year timeline when it comes to your succession plan. If you want to retire in three to five years, then start finding a succession partner now," says Albers.



## MAKING THE TRANSITION EASIER FOR A HESITANT RETIRING LAWYER

Along with having the retiring lawyer talk with the lateral and train them on taking over, the firm has to keep in mind how tough it could be for them to leave.

“Most successful lawyers will have a hard time letting go,” says Colin McCarthy, a Principal at Lanak & Hanna. “They have spent years building a thriving law practice. The key is to communicate with them early and engage them in the process. A successful law firm is a team. It is not one person. If the retiring lawyer understands that the future success of the firm depends on an effective and smooth transition, they will come aboard, especially if they are included in the process.”

McCarthy suggests keeping the retiring lawyer involved even after they’ve retired. You might leave their name on the door, set aside an office for occasional use, create an ad hoc mentoring role, or think of something else for the retiring lawyer to do that keeps them partly connected to the firm post-retirement. “This will help ease the lawyer into retirement and ensure a smooth transition,” he says.

Of course, having a succession plan in general is crucial. As difficult of a conversation is, remind the retiring attorney that ensuring the firm continues to operate successfully is an important part of their legal legacy to their employees and clients.

“It is important to have a succession plan to ensure that not only will your clients be taken care of, but so will the other employees in your firm,” says Cohen. “It can give you peace of mind that the best person for the job will be taking your place.”

### ABOUT THE AUTHOR

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

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**PATRICK SKERRETT**  
 Head of Cloud Operations  
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## For True Disaster Recovery Readiness, Think Beyond Cloud Basics

**Aside from death and taxes, the only certainty in life is that disasters *will* happen, often with little to no warning — and this hard truth has serious implications for the valuable data that law firms work with every day.**

“Not all clouds are the same, making it important for organizations to understand what type of cloud business partner you’re entrusting your data to and what you should be looking for from your cloud providers.”

A disaster can be environmental in nature, like a hurricane, tsunami or earthquake that knocks out data centers for days at a time. Alternately, it could be a manmade disaster, like an act of terrorism or — on a more mundane level — some sort of human error that has unintended consequences. In fact, according to a recent study, anywhere from 70% to 75% of data center failures are caused by human error. If that’s not enough to worry about, disaster can also come knocking at your door in the form of ransomware that can cripple servers and bring operations to a grinding halt. There was a sevenfold increase in ransomware attacks in 2020 alone.

Losing data through any of these disasters can have a big impact on a law firm’s reputation and their ability to effectively meet their clients’ needs and maintain a competitive position in the marketplace.

Given the fact that it’s not a question of “if” a disaster will ever befall an organization but “when,” how should legal organizations best approach their disaster recovery plans?

While the cloud offers a critical way for legal organizations to reduce risk and fortify their data against disaster, not all clouds are the same, making it important for organizations to understand what type of cloud business partner you’re entrusting your data to and what you should be looking for from your cloud providers.

## BEST OF BOTH WORLDS

For decades, disaster recovery has long focused on the recovery point objective (RPO) and recovery time objective (RTO). In layman’s terms, that refers to how far back you can recover data and how long it takes you to recover after a disaster has struck.

Most clouds were built around the concept of having a data center in a single building at one location, and then another data center in a building a couple hundred miles away that you fail over to during the course of several hours.

In this type of traditional setup, your legal staff could be disrupted for the better part of a workday before the system comes back online. While the RPO would ensure their data would be safely there waiting for them, the RTO would take a big bite out of your employees’ productivity while they waited for their critical files to be restored.

A more modern approach is to design for high availability. A high-availability setup might involve three buildings in a single location — each with its own power, network, heating and cooling — that are virtualized and serve as a cluster of availability zones. This high availability means that RTO is largely moot, since the “no single point of failure” nature of the availability zone keeps everything up and running.

However, the best of both worlds is to combine both approaches: to have a high-availability cluster that works in conjunction with a failover site a couple hundred miles away.

Why is this important? Consider the recent crippling power outages in Texas that occurred due to unexpectedly severe winter storms. A regional disruption like that might take down all of the buildings in the impacted geographic location, particularly if the disruption lasts for days, as it did in Texas. But if a backup site is located an appropriate distance away — for this example, let’s say Missouri — it would be unaffected, and it would provide a viable failover site.

When evaluating your cloud business partners, you should place a premium on those that are designed with a combination of both approaches. This provides both high availability and geo-resiliency — ensuring not just higher uptime and availability, but also the ability to withstand an entire regional disruption.

## READY TO ROLL?

Legal organizations should also consider whether their cloud business partner offers archived backups in the event of a ransomware attack. After all, the highest level of availability and the shortest possible RTO window isn’t going to be much



use if one of your professionals has accidentally uploaded an infected copy of a document that is slowly starting to infect and encrypt all your other privileged and confidential files. You need the ability to roll back to protect against that sort of catastrophic event.

Suppose an infected file got uploaded to the cloud on a Monday at noon. You’d want your cloud to offer the ability to roll back to 11 a.m. on Monday for the last known good copy. In the best designed clouds, there will also be offline copies in multiple geos to recover and restore from a specific point in time, not just one single location.

In fact, as an additional protective measure against data loss, geographically dispersed cold storage is also an important consideration. Rather than just having active copies in one region, maintaining cold standby copies in another location adds another layer of resiliency and protection.

Disaster recovery may be a serious matter, but it doesn’t have to be any more difficult than it needs to be. By choosing your cloud providers wisely — and making sure that the clouds they entrust their data to have a combination of availability and geo-resiliency, as well as archiving and rollback capabilities — legal organizations can ensure they’re ready for whatever unexpected disaster comes their way.

### ABOUT THE AUTHOR

**Patrick Skerrett** has been Head of Cloud Operations at iManage since 2014. He has over two decades of experience running SaaS (software as a service) operations for industry-leading cloud storage companies. In his most recent roles, Skerrett has focused on delivering petabyte-scale cloud solutions for tens of millions end users.

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**JAY KOZIE**  
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## The Role of Tech in Client Communications

**In the last year, many legal organizations have done a good job of focusing on their internal technological needs. But fewer have fully explored how technology can enhance their client relationships.**

How effectively are you communicating and collaborating with your clients today? What systems do you have in place for keeping in contact with new and prospective clients and tracking that you're doing it as often as you should?

The right tools are integral to making sure your team members have what they need for effective client communications.

### COMMUNICATION AND COLLABORATION

At nearly every business — and law firms are no exception — video communication tools like Zoom and Microsoft Teams have become standard, even if many people had never used them just 18 months ago. While these tools should certainly continue to be the standard for client communication going forward, perhaps even permanently replacing face-to-face contact in many instances, many firms are overlooking the critical role they can play in business development.

For starters, video communication tools alleviate some of the geographic limitations that previously served as roadblocks to business development. While business development activities were limited to situations where we could easily get in personal contact with other people, the ability to make connections outside of our geographic proximity has been greatly enhanced as everyone's comfort level with these tools has grown.

In other words, the door to business development has been opened to a much broader market — legal organizations just need to walk through it.

“Capitalizing on this openness might be exactly what you need to successfully introduce tools that will better engage the sales process and improve attorney communications with clients in general.”



It's also important not to ignore the channels of communication that have always been open to you, even if you didn't always use them. Traditional communication methods like emails and newsletters are still relevant. Furthermore, your efforts in these areas should increase because they're a great way to reach people who are working from home. The same is true for webinars — they've been an option for years but often got little attention before the pandemic. Now is the time to get comfortable with the idea of presenting face to face via technology and lean into offering webinars that will appeal to your current clients and the new business you want to land.

## STAYING IN TOUCH

But aside from networking and connecting with new people, Zoom, Microsoft Teams and other video communication tools also provide attorneys with better ways to connect with current clients. What might have only occurred before over the phone or in person is now done through video — with the opportunity to see body language (which has its own benefits) and the ability to screen-share and make the call more engaging.

With Microsoft Teams, law firms have the option of replacing legacy phone systems and using a Teams phone as a way to support collaboration within the firm and with clients. In addition, attorneys can easily access any relevant files in their document management system and pull them up on the fly to review, edit and approve all while in a shared environment.

As a result of using these collaboration tools for day-to-day meetings, many are also using the chat functionality rather than sending emails. These systems have proven to be a great way to communicate with co-workers and clients. It's easy to see who is online and available, documents can be easily shared, and it's quick and simple to jump on a video chat or get an update on a project.

But being able to adequately communicate with current and prospective clients is just the first step. Once you're able, it's important that you actually do it. Every firm needs a reliable way not only to keep in contact with clients on a regular basis, but also to track those contacts and send reminders to do it if necessary.

Customer relationship management (CRM) tools have been available to law firms for many years now, but they've historically been used simply for consolidating marketing lists and sending out firm communications. They've been underused by attorneys for business development purposes, largely because attorneys have found them to be cumbersome to implement and use. Some firms have resisted implementing CRM solutions altogether because they've traditionally come with a high price tag.

Thankfully, some recent changes have made CRM a more accessible option for firms and their attorneys. New cloud-based CRM systems have dramatically lowered the cost of entry, and even some of the largest players in the technology arena now offer cloud versions of their popular solutions on a subscription basis.

CRM technology has also advanced, with pipeline management tools gaining popularity either as a front-end addition to existing CRM systems or as stand-alone solutions. Pipeline management tools are more interactive with Outlook, helping attorneys keep track of their client and business development contacts and proactively prompting for follow-ups. They easily generate the reminders that traditionally only happened after a good amount of data entry on an attorney's part.

A 2020 study by Ackert Inc., "The State of CRM at Law Firms," shows that while the adoption of CRM and pipeline management tools is increasing at law firms, it's still only a minority of attorneys who are using those tools, both in general and particularly for contact management. The study suggests that this is largely due to a lack of buy-in at a leadership level.

As with any technology, these new CRM and pipeline management tools will only be effective if attorneys are willing to make changes in their habits and routines. Commitment and buy-in from attorneys and firm management remain critical if these tools are to make a real difference for client communications and business development — one-off use by personally motivated attorneys isn't enough.







The good news, though, is that this might be the perfect time to secure buy-in for new technologies. With everyone working from home, they might have more time to devote to mastering new tools, and they're already primed for incorporating new technology into their routine, having had to make changes on a regular basis to remain functional over the past year. Capitalizing on this openness might be exactly what you need to successfully introduce tools that will better engage the sales process and improve attorney communications with clients in general.

The lack of in-person meetings and events doesn't have to hamper your firm's ability to maintain communication with your clients and develop new business. More than ever before, technology is integral to law firm functioning. Now's the time to realize its ability to help you cement client relationships and attract new business.

**ABOUT THE AUTHOR**

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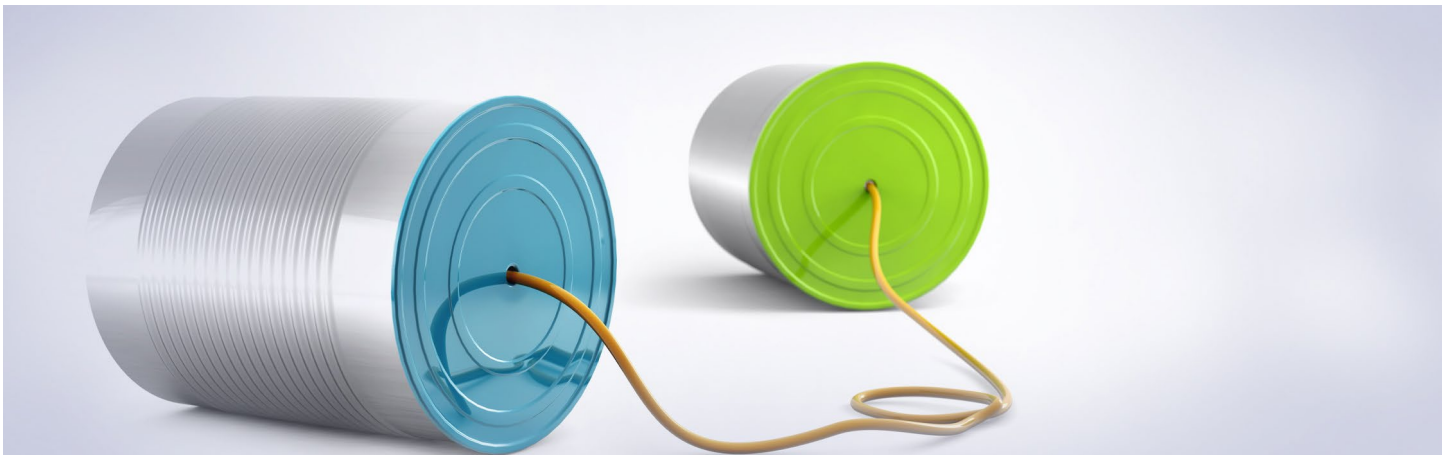


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“Now more than ever, we have need for connection, which was particularly evident in the legal sector at the pandemic’s height — legal call durations increased by 25% as clients shared their worries and simply sought out human contact.”

## Build Client Satisfaction Through Active Listening

**Harnessing the power of listening has significant commercial advantage to legal firms. Just last fall, Moneypenny found in our report, “The Inbound Phone Call,” that calls to law firms have increased by 26% over the last five years, with more than a third of those resulting in a new business inquiry. This equates to a staggering \$266 million for small firms nationwide.**

Converting those calls into new business requires listening — which is actually a choice that requires making the effort to understand what someone is saying. And active listening typically takes that one step further, including giving the person speaking both verbal and nonverbal signs of listening. These can involve obvious visual clues, such as smiling, nodding and making eye contact. But it can also extend to asking questions, reflecting on what’s being said, demonstrating empathy and clarifying the information that’s being delivered.

When it comes to actually answering the call to listen, the legal sector manages their clients better than other markets like utility companies, doctors, phone companies, banks and insurance companies. In fact, in a recent survey of 1,000 adults, the sector was cited the least as being the worst for answering calls. Still, communication in the legal sector can often be one-way, with firms focusing primarily on disseminating information to clients and prospects. Active listening gives clients and prospects the opportunity to communicate with your firm in return and, more importantly, to be heard.

Listening is also an essential part of customer care, but research from LexisNexis suggests legal firms still have some way to go. While 80% of legal firms think their client service is above average, only 40% of clients agree. Additionally, 92% of lawyers think they are good at listening, compared with just 67% of clients saying the same.

Active listening allows firms to garner much deeper insights into the factors that affect clients’ decisions. From creating detailed records about existing clients to accurately mapping target client personas for marketing and lead generation — these insights can be used to dramatically improve retention, enable successful cross- and up-selling, and identify opportunities for new products and services.

It also provides the reassurance and validation clients may be looking for in a friendly voice on the other end of the line. As pandemic isolation continues to challenge our daily lives, listening takes on new meaning and importance. Now more than ever, we have need for connection, which was particularly evident in the legal sector at the pandemic’s height — legal call durations increased by 25% as clients shared their worries and simply sought out human contact. At the same time, live chat features on legal websites became more popular as people reached out for legal help and support outside of traditional hours.

## WHAT TO LOOK FOR

While a combination of client satisfaction surveys and client reviews can go some way toward achieving active listening, these typically take place only once per year and are often weighted toward the questions legal firms think are important. Social media is also a useful and cost-effective tool to engage in and monitor conversations in real time. However, while it makes two-way conversation (and therefore listening) easier, the channel plays out publicly and not without reputational risk.

One of the most underused listening tools is a firm’s website. For example, many firms fail to recognize that addressing search engine optimization (SEO) is a form of listening. With more than 2 million legal-oriented search queries conducted every day on Google, firms that pay attention to what searches are growing or declining in popularity can take cues from their audience.

The addition of live chat further builds on this. By monitoring queries, identifying key words and checking the sentiment of chats, it’s possible to build greater client empathy, spot new opportunities and identify communication priorities. Live chat transcripts can help quickly identify where prospects and clients most need help, from highlighting the information on a website that’s not easy enough to find to identifying issues and questions that should be added to something like a blog. Telephone answering services provide a similar opportunity to evaluate the nature of queries, identify commonalities and inform both service and process innovation.

Ultimately, listening empowers legal organizations to learn from their clients and provides the foundations on which to build meaningful and long-lasting client relationships. More authentic two-way conversation is essential to keep the customer experience evolving and improving, as well as to nurture, build and protect brand reputation.

A concerted effort toward effective and active listening should be at the heart of all legal practice decision-making, helping to inform strategy and steer marketing. As the key to creating confidence, trust, loyalty and value at a time when clients need it most, listening can truly lead to a competitive advantage — you just need to make sure you really hear what’s being said.

### ABOUT THE AUTHOR

**Eric Schurke** is responsible for overseeing and building the strong growth plans for MoneyPenny and VoiceNation in the United States. With over 16 years of industry experience, Schurke has led his team to provide the highest level of quality answering services to thousands of businesses worldwide. His expertise in workforce optimization and strategic planning has created an innovative and reliable atmosphere.

 [moneypenny.com](http://moneypenny.com)



## Online Learning Hub

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# Anniversaries, Awards and Appointments

## Members on the Move »



**Rafael Araujo**, a member of the Houston Chapter, is now Chief Operating Officer of Hanna Brophy MacLean McAleer & Jensen, LLP, in Oakland, California.



**Nancy Audi** (not pictured), a member of the Albany Chapter, is now Office Manager/Accounting at Herzog Law Firm, PC, in Albany, New York.



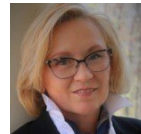
**Catherine A. Egan**, a member of the Boston Chapter, is now Director of Office Services and Facilities at Hemenway & Barnes LLP in Boston, Massachusetts.



**Kit Fong**, a member of the New York City Chapter, is now Director of Administration for Northern California at Arnold & Porter Kaye Scholer LLP in San Francisco, California.



**Kathy J. Pline**, a member of the Wisconsin Chapter, is now Vice President of Operations at DeWitt LLP in Madison, Wisconsin.



**Stacy L. Shaw**, an independent member, is now Manager of IP Operations at Polsinelli in Washington, D.C.

## Sharing Our Condolences

Longtime ALA member Sharon L. Grealey passed away in February at the age of 54. She first joined ALA in 1997 and was also a member of the Raleigh Durham Chapter. She worked as a Legal Administrator at Wilson Ratledge PLLC in Raleigh, North Carolina. Previously, she spent nearly 25 years at Brooks, Stevens & Pope, P.A. Contributions in her memory can be made to the SPCA of Wake County and the Leukemia & Lymphoma Society. Our thoughts are with her family, friends and former colleagues.

ALA recently received the news that member Susan Williams passed away in September at the age of 48. She spent 10 years as the Firm Administrator for Cherry, Edgar & Smith, P.A., in West Palm Beach, Florida. Donations in her memory can be made to the American Cancer Society. Our sympathies are with those who knew her.



# What's Happening at Headquarters

There's always a lot going on at ALA headquarters in Chicago. Here's a snapshot of what's in store for the coming weeks.

## Meet the Featured Speakers for ALA's 2021 Annual Conference & Expo

This October in Austin, Texas, ALA's 2021 Annual Conference & Expo is sure to educate, challenge and inspire with a fresh, energized program. Full agenda details will be shared with soon, but in the meantime, check out two of our featured speakers:



**Keynote Speaker: Sarah Thomas** is the NFL's first full-time female official and one of *Sports Illustrated's* 100 Most Influential NFL Figures. She will share essential leadership lessons and takeaways for breaking through in your own career.



**David W. Brezina Memorial Session Speaker: Rick Rigsby, PhD**, is the President and Chief Executive Officer of Rick Rigsby Communications. He will challenge you to expand your focus and empower you on a journey to superior leadership performance.



Need help securing approval and funding to attend Annual Conference? Our three-step Justification Toolkit can help you clearly communicate the return on investment to your organization. And make sure your managers know about the worry-free registration policy, which guarantees that your investment won't be lost should in-person attendance no longer be possible due to the pandemic. Visit [ALAannualconf.org](http://ALAannualconf.org), contact us at [info@alaannualconf.org](mailto:info@alaannualconf.org) or 1-888-593-7243.



## The Virtual Master Class Is Happening This Month!

Sign up now to attend ALA's Virtual Master Class: A Framework for DEI&A. Both days of the online event, April 28 and April 29, will feature a morning and afternoon session. The programming is designed to help you develop processes and policies that correspond with your specific goals and desired culture regarding diversity, equity, inclusion and accessibility (DEI&A). Register at [alanet.org/master-class-deia](http://alanet.org/master-class-deia).

Why attend? Not only is championing these ideas in your firm the right thing to do, it's also the prudent thing to do, as high-performing legal organizations have become more and more proactive in their DEI&A efforts. Your competitor may have a plan that attracts the rewarding clients and quality employees you want. There is a strong, proven business case for DEI&A that shows you will have increased productivity, more innovation, higher market share, increased employee satisfaction and longer retention.

**Check out the speakers and schedule**, featuring sessions like:

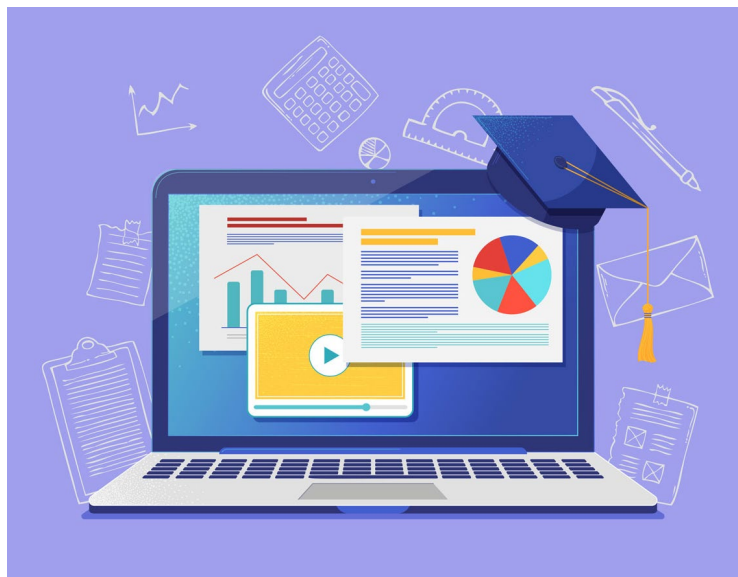
- The Intersection of Identity and Racism: Loving US into Our Healing
- The Business Case for Promoting Conscious Inclusion in Law Firms
- Leading While White — Betraying White Supremacy: The Praxis of Anti-Racism Moment to Moment

## Another Round of Online HR Education

Want to burnish your administrative bona fides? Interested in earning a **Legal Management Specialist Certificate** that will boost your résumé? Then you should leave room in your schedule for ALA's web-based courses, which go deep into law firm human resources or financial management in a classroom-style format — all conveniently online.

The next human resources course, **HR 2: Performance Management and Compensation**, kicks off May 13 — the registration deadline is May 7. The financial management courses begin later this year, but you can register for them now as a package or individually.

Visit [alanet.org/web-based-courses](http://alanet.org/web-based-courses) for more information.



## Attend the Virtual Annual Meeting on May 6

ALA's Annual Meeting will take place virtually on May 6 at noon Central. Registration is required, but this event is open to all ALA members and business partners. A recording of the meeting will be posted on the ALA website for those unable to attend live. Register at [alanet.org/about-membership/about-ala/ala-news-updates/annual-meeting](http://alanet.org/about-membership/about-ala/ala-news-updates/annual-meeting).

Normally, an Association Luncheon is incorporated into the agenda for each Annual Conference, which serves as the Annual Meeting of the Association as required by the ALA bylaws. The transition in ALA leadership also traditionally occurs at this luncheon. Although we will be gathering again in person at the 2021 Annual Conference & Expo in October, we need to ensure a timely transition of leadership this spring.

During the virtual version, ALA President Debra L. Elsbury, CLM; President-Elect Michael T. Bumgarner, CLM, CPA, CGMA; and Executive Director April L. Campbell, JD, will deliver information regarding the current state of the Association. We will also mark the transition of leadership Association-wide as Debbie recognizes outgoing Directors and officially passes the gavel to Mike.