

# LEGAL MANAGEMENT

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## 7 Steps to Secure Institutional Knowledge

When experienced staff leave, they take with them their best practices. Here's how to prevent it.





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“Having a robust and high-quality network of people you are connected to is critical for professional success.”

## Power of One Networking

**“Behind every successful person there are many successful relationships.”**

– Joe Apfelbaum

The **power of one** is a concept I hold near and dear to my heart. My power of one principle lies in my belief that all great things start by just one small action. One person stretching out their hand to introduce themselves. One person raising their hand to volunteer. One conversation that spurs action. One interaction that sparks inspiration.

The idea that even just one individual, through their actions, can make a significant difference to create positive change can and will change how you interact with people. This principle is particularly important to keep in mind when nurturing and managing your professional network. Having a robust and high-quality network of people you are connected to is critical for professional success. However, meeting someone once and being connected on LinkedIn and linking their posts is not a relationship. While we all lose touch with some people over time, there is never a better time than now to rekindle that old networking relationship with one small action.

Here are a few ideas to get your power of one networking started:

- » **Make a lunch date.** Kevin Ferrazzi, author of the book *Never Eat Alone*, says a lunch eaten alone is a missed opportunity to nurture a relationship. Reach out to someone today and make lunch plans for next week.
- » **Send a quick note.** Review your LinkedIn contacts and pick three people who have either just got a new job, announced a promotion, received an award or recognition, shared that they are attending an event, or gave a presentation. Then send them a short note to congratulate them, ask how their presentation went or what they learned at the conference they attended. Small actions can go a long way to finesse your networking.

» **Share something of value.** We regularly read articles every day that we find helpful. Find one article this week that you read and share it with one other person who you think would benefit. Then include why you think they might find it helpful and what your top takeaway was.

The power of one is a reminder that even a single contact can make a difference. As many of us come together in Seattle at ALA's Annual Conference & Expo, I challenge everyone to find a power of one networking opportunity with someone they do not know. Find a first-time attendee and introduce yourself to them. Find someone attending conference on their own and

invite them to your group dinner. Introduce yourself to others around you and connect with them after the conference is over. Send a personal welcome email to a new member, invite them to an event and offer to introduce them to others.

As we all know, it is the little things that we do for ourselves and each other that matter the most. Never underestimate the power of your own actions and the positive impact they can have. And never forget, as Bill Nye once said: "everyone you will ever meet knows something you don't."



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**ANTHONY DAVIES**

Chief Revenue Officer  
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# Flexibility Is Key to Managing Staff Headcount

**In today's economic uncertainty, firms are challenged to understand how layoffs and escalating levels of support staff attrition are affecting efficiency and performance in the delivery of legal services. The question is, can current support models meet the needs of lawyers and clients?**

First, let's look at the three very powerful market forces that are impeding firms' abilities to run world-class, efficient and productive legal operations:

## 1. Layoffs

The first of these forces is the effect of the down economy. By the end of 2022, overall demand for legal services had contracted by 0.1%, causing lawyer productivity to decline, which translated into a loss — on average — of \$98,000 in fees per lawyer. This was on the heels of a 24-month-long war for talent that resulted in the highest associate pay increases on record and related record increase in overhead expenses.

It came as no surprise, then, that firms started announcing layoffs of attorneys and staff at the end of 2022 and the beginning of 2023: Cooley, Strook, Goodwin, Kirkland, Procopio and Gunderson are just a few of the marquee-name firms that have been public and transparent about their layoffs. No firm likes to lay off staff, but when they do, one concern is that institutional knowledge is also walking out the door with them, which can impede the delivery of legal services. If a law firm is still modeled in a traditional attorney-secretary model, this can be especially true.

## 2. Talent Shortage

Law firms have known about the support service attrition time bomb for years. In a 2020 survey by BigHand, firms were expected to lose 58% of their "traditional" legal secretaries in the next five years due to retirement and attrition. That number has risen

“With a flexible support model, firms can gain flexibility when and where they need it and ramp up or down as needed without burdening the operation with lengthy and expensive recruiting and training processes.”



dramatically post-pandemic; 75% of firms based in the United States say increased churn is affecting support services staffing.

The pandemic has triggered a need for a new skillset from support staff, creating emerging gaps in skills and expertise. While the total full-time equivalents for support staff declined in 2021 and 2022, the total compensation for and the compensation per role increased. This is because firms were decreasing the numbers of lower-level staff and increasing staff in higher functional areas while paying the compensation differentials necessary to do so.

### 3. Increased Competition

Fifty percent of buyers have adjusted their law firms in the last 12 months, and that will continue through 2023. Add to this shrinking demand an expanded playing field of competitors that now includes an array of midsize law firms, boutique and specialty firms, accounting firms, new law companies, and the proliferation of other well-funded alternative legal services providers who are taking significant client and market share away from traditional law firms.

So how can firms pivot legal operations to succeed in this environment?

### FLEXIBLE SUPPORT MODELS CAN HELP FIRMS SUCCEED

Many firms are taking the opportunity to restructure their legal operations models altogether. Some firms have taken the path of reinventing it: Fish & Richardson announced the elimination of its litigation secretary role. Morgan Lewis offered a buyout package to all its legal secretaries nationwide. Fox Rothschild offered 300 support staff separation packages as part of a practice-specific support model. And Reed Smith reduced its secretarial personnel and aims to retrain its remaining secretarial staff into an executive assistant role.

Another way that firms are successfully navigating the market is leveraging a flexible staffing support model — including a range of delivery models from temporary staffing to modern, flexible outsourcing arrangements. Where traditional outsourcing was historically locked in with long-term contracts, many firms don't realize how some providers have shifted to a flexible outsourcing program that provides firms the traditional benefits of expertise and cost cutting but does so outside the traditional parameters of long-term contracts. With a malleable support model, firms can gain flexibility when and where they need it and ramp up or down as needed without burdening the operation with lengthy and expensive recruiting and training processes.



When working with a service partner, the burden of recruitment and training shifts from the law firm to professional recruiters who are able to find the right talent even in challenging markets. Not only is this shift in risk from the firm to the service provider a benefit to the firm, but it also can be especially helpful as firms are challenged by identifying the new skillsets required of their support professionals.

The importance of flexibility is one of the predominant lessons firms have gleaned from both the pandemic and today's competitive market. As the support model of legal operations continues to evolve amid economic uncertainty, leveraging the flexibility, recruiting prowess and expertise of a service partner can help firms remain competitive without incurring risk — a powerful win-win!

#### ABOUT THE AUTHOR

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**DAVID H. FREEMAN, JD**  
*Founder  
 Lawyer BookBuilder*

“As a leader, you must determine the outcomes you want to achieve (your goals), and then reverse engineer to identify the activities that will get you there so you can measure your progress toward achieving those goals.”

## Taking ‘Measure’ of Your Lawyers

**You’ve probably heard versions of the phrase “What gets measured gets managed, and what gets managed gets done.”**

The question I have for leaders, especially when it comes to business development is, are you measuring the right things to activate the behaviors you seek? We are so used to measuring outcomes such as billable hours worked and revenue (which are success measures), that we often don’t place the same rigor and priority on measuring the activities that get our lawyers to achieve those success measures.

Our lawyers very often need our guidance to understand what they should do to grow their practices. They need insight into which activities will achieve personal and firmwide goals. Which means as a leader, you must determine the outcomes you want to achieve (your goals), and then reverse engineer to identify the activities that will get you there so you can measure your progress toward achieving those goals.

Whether you have a formally drafted strategic plan, or generally know the key areas that need to improve, you can serve as the wizard-behind-the-curtain to focus your lawyers’ attention on engaging in the right activities.

For example, let’s say your firm has a handful of partners who bring in most of the work and they are nearing retirement. Therefore, your goal is to develop the next generation of rainmakers. The problem is, these folks have generally been service lawyers, but now they must get out into the marketplace to bring in work themselves. This might be a new requirement for many of them, so they will need specific guidance on what they must do.

So, what measures should you use to influence them to engage in the right activities? They need to increase the number of people they know who have the power to give or refer work, they should become more visible in the right organizations, publications and on social media, and they must engage in conversations with the right people to build relationships and learn about their needs.



To that end, a leader can set goals and measures for activities such as:

- » The number of people attorneys know who have the power to give or refer work, and how much that number increases over time.
- » The number of times they contact those people, both actively (live conversations) and passively (mass distributions like emails).
- » The number of talks, articles, social posts and emails sent to the right audiences to stay top-of-mind and establish a position of thought leadership.
- » The number of business development meetings they engage in with those audiences.

Maybe you have other opportunities to activate a higher and better level of business development. Perhaps you send your lawyers to many conferences, but not much work comes from their attendance because they are not engaging in enough of the right behaviors, such as meeting the right people, conducting the right conversations and completing the right follow-up activities.

Goals and measures you can implement in this scenario can include:

- » At least a month before the conference, your lawyers should submit a plan for how they will maximize their effectiveness at the event.
- » The number of breakfasts, lunches, dinners and after-event time slots they schedule in advance with potential clients and referrals sources.
- » The number of probing questions they ask when meeting these people to learn about their needs.
- » The number of next steps they get with the people they meet that gives them “permission” to follow-up after the event.
- » The number of follow-up contacts they make with people they met at the event (as well as those they didn’t meet but wish they did).

You might also have a different scenario. Perhaps you have lawyers with relatively large networks but they aren’t getting enough work from them, both in their own practice and across other firm practices. They’re frustrated, because they know these folks are good candidates for sending work to the firm, but they just can’t push them across the finish line. Goals and measures that could be applied to trigger the right activities here could include:



- » The number of meetings they schedule with their contacts.
- » The number of open-ended questions they ask their contacts relating to their business and legal issues they may be facing.
- » The number of times your lawyers offer some free services (“gifts”) that allow those contacts to sample the work of the firm. For example, it might be an offer to review policies and procedures. Or perhaps they provide training or review documents. Whatever means they choose allows your lawyers to get deeper into their legal needs, which can lead to new work.
- » The number of next steps they get that relate to the gift they offered or other activities that would be valuable for that potential client.

At the risk of alienating those who don’t like sports analogies, this is like a basketball coach setting behavioral expectations for the team. We know the mega-goal is to score more points than the other team by the time the game is over, but they also know setting subgoals and measuring key activities like assists, rebounds and steals are key indicators of eventual success.

One of my favorite quotes, from All-Pro football player Russ Francis, is “We’re going to have a good year if our coaching staff lives up to its potential.” As a leader, if you live up to your potential by acting like a great coach, your “team” of lawyers can have a great year too.



### TUNE IN FOR MORE ON WHY MEASURING MATTERS

David Freeman, JD, recently sat down with *Legal Management Talk* to discuss how to measure your — and your lawyers’ — progress. Watch it on YouTube or download it wherever you get your podcasts. [alanet.org/podcasts](https://alanet.org/podcasts).

### ABOUT THE AUTHOR

**David H. Freeman, JD**, is a member of the *National Law Journal* Hall of Fame for being voted the top law firm business development coach and consultant in the United States for several consecutive years. He is a two-time best-selling author who has written and co-authored 14 books on law firm leadership and business development and has trained and coached over 10,000 lawyers and leaders in hundreds of firms worldwide. Additionally, he is the creator of Lawyer BookBuilder®, an online, self-study program that shows lawyers how to transform themselves into major rainmakers.



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PAULA TSURUTANI

Freelance Writer and Editor

“Clients expect their law firms to use technology, data, and project management to deliver excellent results and provide exemplary service.”

## Step into the Innovation Lab

*To stay competitive, some firms have created these formal innovation labs to merge tech, client collaboration and new product development.*

**Traditionally, legal organizations have focused on finding client solutions that have involved a cautious, measured and analytical process.**

But that's a good way to lose business.

“Eventually, clients will be switching to other firms that are embracing the technological advancements and possibilities that are more efficient and collaborative,” says Daniel J. McCormack, CLM, Chief Executive Officer of Dan McCormack & Associates LLC. “Firms need to continue to adapt to new methods or risk falling behind.”

To stay more competitive, some firms have created formal innovation labs that merge technology, client collaboration and new product development. While their approaches vary, all are focused on enhancing quality, advancing efficiencies and improving client service. In a crowded market, it's just one more tool to potentially help firms win business, so much so that law schools are tailoring programs to meet the need.

Law schools, recognizing the need for innovative services like these, are even responding with programs and degrees. The Master of Science in Law (MSL) degree at Northwestern Pritzker School of Law is the first master's degree of its kind that combines the study of law, business and technology. The MSL program now has 550 alumni with diverse backgrounds, including data analytics, neuroscience, operations and business.

Daniel W. Linna Jr. co-leads the Pritzker School of Law's Innovation Lab, where teams of Computer Science and Law students — including students from the MSL — have worked with law firms, legal departments, courts, and businesses to develop prototype technology solutions for legal services delivery challenges. Many MSL degree graduates now work in law firms or legal departments.

**“Addressing change management concerns with attorneys taking part in this journey is critical to generating long-term success and buy-in. It makes sense to start with a coalition of the willing and encourage that group to be your ambassadors for change.”**

“Clients expect their law firms to use technology, data, and project management to deliver excellent results and provide exemplary service,” says Linna. “This requires a client service team with lawyers who understand these disciplines, as well as other legal professionals with deep expertise in these areas. Our courses aim to prepare JD and LLM [Masters of Law] students for success as attorneys, and MSL students for success in a variety of legal operations and related roles.”

## CUSTOMIZING TO YOUR FIRM

The first thing to note about innovation labs is that they can be scaled to fit any size firm. So if you’re thinking this won’t work in your smaller firm, that’s not necessarily true. Even small and mid-size firms can consider supporting an innovation lab.

“I would suggest that the size of the firm is irrelevant,” says Madeline Boyer, PhD, Director of Reed Smith’s Innovation Lab. “Any firm can innovate the way they are delivering services, providing value and creating efficiency. In fact, clients are demanding it! An innovation lab is just a way of centralizing the skills and expertise to facilitate this.”

McCormack agrees, noting that while many firms lack the resources and capacity to implement a fully staffed innovation lab, the concept and processes seen within successful labs are adaptable to all firms. “As a first step, firms should be asking all lawyers to commit time to stay informed about new technologies that align with their practice area and clients.”

Starting modestly is how Holland & Hart’s innovation lab got up and running. The team initially worked with practitioners in the intellectual property practice group to improve efficiency and workflow.

“The innovation lab has always been relatively low-risk for the firm because it grew organically from the bottom-up,” says Jason Adaska, PhD, Holland & Hart Software Development and Innovation Lab Director. “We were never in a situation where we had a large staff. ... We started small, secured tangible wins and grew as we could justify the firm’s investment.” After delivering several successful applications, the firm invested in the creation of a standalone Innovation Lab in 2017.

Now the firm’s innovation lab focuses on delivering technology solutions that enhance efficiency and improve the quality of life of practitioners and staff members, says Adaska. “Most of the team is based in Boulder, Colorado, where we work, quite literally, side-by-side with the practitioners in a workspace specifically designed to facilitate innovation and collaboration.”

In June 2022, Norton Rose Fulbright (NRF) announced a subsidiary, LX Studio, the U.S. legal technology delivery arm of the firm’s global NRF Transform program.

“[Through this], clients get access to a curated selection of legal tech products along with the implementation, support, and guidance to leverage these tools and improve workflows,” says Daniel Farris, Partner-in-Charge of Norton Rose Fulbright’s Chicago office. One of the lab’s award-winning products, NT Analyzer (short for Network Traffic Analyzer), helps clients detect personal or proprietary information that ends up with third parties, in violation of privacy laws.

Partnering with other businesses to develop client-centered solutions is a key initiative that expands innovation possibilities. “We are focused on partnerships that create value for our clients and our attorneys, whether through increased efficiency, reduced risk or reduced costs,” says Christy Bentz, Norton Rose Fulbright’s U.S. Chief Client Value and Innovation Officer. “We are being very intentional about adding new partnerships to ensure we are appropriately resourced to scale.”





Meanwhile, Reed Smith piloted its innovation lab in early 2022, envisioning it as “a virtual space for discovering, incubating, and accelerating creative ideas at the firm and with clients,” says Boyer. It has a core team that manages and leads engagements and methodology, but also works as a connector across the firm’s offices, facilitating and coordinating innovation initiatives.

“The lab is in its early stages and our focus — short term — is on working with our practice groups,” says Boyer. “We see ourselves as supporting our internal teams and external clients to identify new ways of collaborating and delivering legal services. Of course, the lab aims to have a positive return on investment, whether through efficiencies gained on existing business, or opening up the capacity and new ideas for driving growth.”

Adaska says Holland & Hart’s Innovation Lab is primarily staffed by technologists — software developers, UI/UX designers, data scientists, solutions engineers and operations professionals. “Members of the team have first-hand legal experience, but no member is an attorney.”

As a subsidiary, Norton Rose Fulbright’s LX Studio is overseen by a board of directors, led by the firm’s U.S. managing partner. The lab shares day-to-day management resources with the firm, with two full-time managers dedicated to LX Studio products.

“These individuals work with our attorneys and others within the firm’s IT, innovation, marketing and client value teams to market and successfully implement LX Studio products with firm clients and prospects,” says Bentz.

## PUSH THROUGH CHALLENGES

Planning and managing projects around client deadlines, attorney availability and existing resources is crucial.

According to Adaska, regardless of headcount and staffing, one of the biggest challenges “boils down to a lack of

practitioner time.” Schedules are tight in legal. Technologists still need feedback from lawyers to finetune, enhance and troubleshoot products. Understanding these time constraints and work realities are key factors in developing realistic schedules and expectations.

Top management also needs to champion the initiative and make it part of the firm’s strategic efforts. “Broadly speaking, most law firms and corporate legal departments are resistant to change,” says Bentz. “Addressing change management concerns with attorneys taking part in this journey is critical to generating long-term success and buy-in. It makes sense to start with a coalition of the willing and encourage that group to be your ambassadors for change.”

“Clarity is key,” says Farris. “While you can never eliminate risk or fear of the unknown, you can lower reluctance and fear with clearly defined expectations, processes and responsibilities.”

The innovation lab also needs to be included in mainstream firm activities and discussions. It cannot be “off working in a corner by itself,” says Boyer. “It needs to be visible, sending the message: This is how we solve complex problems.”

Plus, patience will go a long way to making labs successful. “It takes time to develop, adjust, retest, adjust again when adapting to something new,” says Adaska. “It’s not a quick-turn endeavor.”

“Patience is a virtue in the innovation world,” says Boyer. “Starting small fires is the way to engaging, gaining interest and overcoming resistance or indifference.”

### ABOUT THE AUTHOR

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**WENDY MCCLELLAN**  
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“Preserving the intangible knowledge is trickier. When experienced employees leave, they take with them their best practices — their cheat sheets and rules of thumb, their key relationships inside and outside the company, and how things truly get done and who does them.”

## 7 Steps to Secure Institutional Knowledge

*When experienced staff leave, they take with them their best practices. Here's how to prevent it.*

**The Great Resignation brought on by COVID-19 and new expectations of work-life balance have drawn greater attention to a persistent problem for legal entities and business owners: how to maintain institutional knowledge in the face of record turnover.**

An April 2022 report from Gartner notes that 73% of the Chief Executive Officers (CEOs) they surveyed expect a shortage of workers or skills to disrupt their business in 2023 — workers they will not be able to replace easily. These extended losses will not only continue to fracture workflow, but the resulting brain drain will wipe out generations of institutional knowledge. This challenge particularly affects smaller law firms, which may not have had the resources or scale for formal institutional knowledge retention.

Such knowledge, also called organizational memory, can be tangible — the documentation of procedures and training manuals, for example — or intangible — the practical wisdom of seasoned employees.

Retaining that tangible knowledge takes some work but is fairly straightforward: document processes and procedures and digitize them in an easily accessible format.

Preserving the intangible knowledge is trickier. When experienced employees leave, they take with them their best practices — their cheat sheets and processes, their key relationships inside and outside the company, and how things truly get done and who does them.

The accretion of employees' memories builds the organization's collective memory, enabling the business to function. Long-standing employees pass along this intangible

wisdom informally, often by word-of-mouth. If best practices exist only in the employees' minds or scattered on sticky notes, the chain of knowledge is irretrievably broken when they leave, especially if the exodus is massive and sudden, as with the Great Resignation.

This loss costs companies money, time and efficiency.

Beyond retaining more of their critical employees, how can firms preserve institutional knowledge? By making it a priority and having a plan. That's why Holly Walters, Chief Operations Officer of Shapiro Law Team, implemented a firm-wide practice to safeguard information and keep their cases moving. "We want to ensure that everyone in our firm, from the receptionist to the managing attorney, knows what each team is responsible for."

## MAKE PLANNING A PRIORITY

Workforce turnover is a natural, even necessary, aspect of a company's growth. Different phases of a firm's life cycle require different skillsets, and strategic turnover eliminates ineffectiveness and keeps the firm nimble and adaptable to market changes.

Turnover becomes a challenge, however, when it is no longer natural — when it comes as a tsunami rather than a predictable ebb and flow. In the face of such vast and unexpected change, organizations default to a reactive mode, patching the levees holding in their institutional knowledge with sandbags that will inevitably be washed away. Instead of throwing sandbags at the problem, companies should build better levees. By being proactive and strategic in combating institutional knowledge drain, organizations can minimize the risk of unprecedented workforce attrition and keep their companies from going sideways. How? By creating a culture of knowledge sharing and the systems to support it.

This proactive strategy firm puts leaders back in control, and it won't take a complete restructuring of your current processes to do it. It merely requires a renewed dedication to making institutional knowledge just that — institutional rather than individual.

Let's explore seven methods to make that happen.

### 1. Identify, Prioritize and Educate

To preserve institutional knowledge, all employees must understand its importance. Create a company culture that values information sharing across the enterprise and has formal systems to support that sharing — information systems, data analytics, training systems. Avoid information silos and turf wars.

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**"When you need to change the water filter on your fridge, you look up a video. The same concept applies to institutional knowledge."**

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Then examine all levels of the business and identify the value and volume of existing institutional knowledge. Identify the key components and processes every team member should know, and prioritize what to capture and share. Think creatively. Do you only want to capture skill-based information or project management tools as well? Technology hacks or past strategic initiatives? Once you identify the knowledge you want to preserve, put those formal systems in place to do so.

### 2. Involve All Employees

Walters believes it is vital that all teams understand the important stages of any case from onboarding to settlement as well as knowing and completing the proper digital screens to keep the pipeline moving. In implementing their plan, the Shapiro management team worked with each of their teams to create checklists, training courses and desk manuals.

"The desk manuals, whether physical or online, are step-by-step guides for each team member and are set to be updated frequently," Walters explains.

She not only shares these tools across teams but requires all new employees to cross-train with each team manager — new attorneys train with onboarding, new paralegals train with settlement and so on. Walters makes it clear that this is a management initiative and gives the leaders ownership of the process development and information gathering. Not only do these practices encourage knowledge sharing, but they make for higher-quality client service. When employees leave, the transition is fairly seamless.





### 3. Cross-Training and Transparency

The goal of cross-training is not to add to the employee's workload but to expand their knowledge and engagement with the organization and create transparency about the demands and requirements of different roles. Transparency results when everyone's duties are no longer shrouded in mystery and the culture is based on performance and collaboration, not competition.

Make it a priority by incorporating it into the employee's performance review. Create a quarterly goal with specific timelines, departments and partners; then have everyone discuss what they learned. Such conversations let you know how well the firm is adopting the information-sharing culture.

Walters notes when the firm implemented transparent cross-training, it saw less competition and greater collaboration among departments along with more efficient knowledge sharing. Plus, it resulted in increased productivity.

### 4. Mentorship Initiatives

In any organization, mentors — veteran employees who help newbies learn the ropes — are often the ones passing down institutional knowledge. The problem is, most mentorships are ad hoc and informal. The answer: Make them formal. Create a program that pairs veteran staff with less-seasoned employees.

Harleigh Jones, a former Firm Administrator in Arizona, developed a training program that relied on veteran employees. "Having a mentor training system reduced barriers to the firm's knowledge preservation as it became a natural training tool," Jones explains. Veteran employees pass along what they know, eliminating the temptation to hoard information that wreaks havoc, especially on smaller firms.

For a mentorship program to succeed, it must be part of the job description, not an add-on. Make it a structured program. Create rewards and incentives for the mentors to do a good job, such as bonuses, extra planned time off (PTO) or recognition. Implant the value of mentorship in the DNA of every role.

### 5. Create a Learning Library

Encourage employees to build spreadsheets, folders and drives thick with lists of processes, contacts, providers, referral sources, white papers, articles, email chains, videos and so on. Encourage employees to update the information as a matter of course.

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**"When you need to change the water filter on your fridge, you look up a video. The same concept applies to institutional knowledge."**

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Start by asking your employees what resources they need. You'll be amazed how many workers have their own cheat sheets already set up. Create a general location for these lists and encourage people to use them.

To curate and disseminate the firm's institutional knowledge, establish the role of Knowledge Librarian as part of the training team. This is a critical function in the Information Age.

### 6. Implement Succession Planning

Most firms have some version of succession planning at the C-level, but it is often overlooked at the employee level. At all levels, succession planning is an important strategy not only for replacing workers but also for passing on knowledge and skill sets.

Jones faced this challenge when she scheduled a three-week vacation. "I needed to know who could take over for me at any given moment. I began looking at their strengths and weaknesses and distributed my workload accordingly." Implementing this strategy in a formal way enables more seamless coverage for PTO, internal promotions and turnover.

When a worker is promoted, for example, give them the time to train their successor. They'll be happy to share their tips, tricks and efficiencies to leave the role in better shape than they found it. Likewise, when an employee leaves the company altogether, have them train their replacement. Sometimes, for legal reasons, this isn't possible. That's why promoting a culture that requires an ongoing documentation of work processes and best practices is critical. If someone leaves the company today, their replacement should be able to review the documentation and get up and running by the end of the week.

### 7. Capture It with Video

When you need to change the water filter on your fridge, you look up a video. The same concept applies to institutional knowledge. Digitally archived written records are a valuable resource for retaining institutional knowledge, particularly in its tangible forms. Video preserves intangible forms of knowledge more effectively than text because it allows for demonstration as well as explanation.



According to Forrester Research, 75% of employees would rather watch a video than read an email or manual. Recording key project discussions, strategy meetings and tutorials not only captures a team's processes and agendas, it conveys the hidden context and nonverbal communication between the lines.

Firms can incorporate video technologies into many of the aforementioned methods. For example, as an element of succession planning, you can create an "Ask the Expert" forum in which retiring employees discuss their roles and best practices. Video records can also support cross-training initiatives without interrupting busy colleagues.

## GROW OR WITHER — IT'S YOUR CHOICE

Like human memory, organizational memory can grow or wither. Creating a strategy for preserving institutional knowledge not only makes your business more resilient when employees move on, it strengthens your business's long-term innovation and growth, leading to greater

engagement and less turnover. By engaging your employees as active participants in developing and capturing institutional knowledge, you not only preserve and build that knowledge, you also encourage your employees to stick around.

### ABOUT THE AUTHOR

**Wendy McClellan** is the Founder of Structure for Success, an HR consulting firm working with businesses without an internal HR team to assist them with hiring and employee support services. Her forte is working with leaders who want to elevate their company's profitability and efficiency. She has been in leadership roles for over 30 years and has taken her corporate knowledge and turned it into a resource for small business owners. She is a Kolbe-certified consultant and an instructor at Arizona State University's Lodestar Center. Additionally, McClellan serves on the Grand Canyon University Honors College Advisory board in Phoenix, and regularly speaks on leadership, communication, employee support and business development.



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Communications

“  
We all have different brains.  
You can’t tell just by looking  
at them if somebody is  
neurodivergent.”

# Understanding and Enriching Neurodiversity Hiring

*Recognizing unseen talents can truly add value to your firm.*

**The brain really is a wonder. In any given day at any given moment, it’s sending signals throughout your body to do everything from breathing and talking to helping you think and process the information you are reading in this very article. All these actions are the results of signals passing through neurons. With so much at work, it’s not at all surprising that some signals pass through differently for some humans.**

In other words, everyone’s brain is wired differently. That’s something to keep in mind as you learn more about neurodiversity, a term that is rightfully taking its place as we have more conversations about the value of diversity in our workplaces.

“There are so many qualities that make a team diverse, and neurodiversity is one,” says Tiffany Ho-Rivera, Director of Operations at Rogoway Law Group and the current Chair of ALA’s Committee on Diversity, Equity, Inclusion and Accessibility. She speaks from experience after working as a behavior interventionist for over six years, where she worked closely with children, individuals and families with developmental disabilities, primarily autism and ADHD.

It’s something that Haley Moss, Esq., works to advocate and educate for. Diagnosed with autism at age three she notes that the concept of neurodiversity refers to all of us. “We all have different brains,” says Moss, who works as a hiring trainer for law firms in Florida. “You can’t tell just by looking at them if somebody is neurodivergent.”

According to the Cleveland Clinic, neurodivergence is a nonmedical umbrella term used to describe those whose brain works or develops differently. Someone being on the

autism spectrum comes to mind, but it's more than that. Moss says it's people with ADHD, learning disabilities, intellectual disabilities, mental health conditions, epilepsy, traumatic brain injuries and other cognitive disabilities.

Such differences are common. The National Institutes of Health's Division of Cancer Epidemiology and Genetics estimates that 15% to 20% of the worldwide population are neurodivergent. Moss notes that you can run the gamut of anything that makes your neurological and cognitive function outside of the prescribed idea of what's expected.

## BE FLEXIBLE

With statistics that high, it's important for legal managers — especially those responsible for hiring — to understand what it means to be neurodivergent.

"[Neurodiversity] is about addressing ... a huge need to support businesses in creating a space and a workforce that's inclusive of individuals with [nonvisible] disabilities," says Stacey Herman, Assistant Vice President of Neurodiversity and Community Workforce Development at Kennedy Krieger Institute in Maryland. Originally a special education teacher for elementary-age students, she's worked at Kennedy Krieger Institute for the past six years, where she helps attract neurodivergent talent not only to the Institute but also trains firms throughout the United States to have broader hiring outlooks.

For example, someone might struggle with the social aspect of the interview but excels at the skills portion. That's a skill that can translate well into some legal jobs. "Sometimes our idea of who is ideal leaves out people that would be truly brilliant. Maybe the best person is someone who might not have a natural social instinct but is a great listener," says Moss. She adds there really is something for everyone in the legal profession, "whether [they] want to be in a courtroom or do something more transactional and not interact with people as much, such as research."

The first step is to think about the way you recruit. A neurodiverse candidate may not be seeking out job opportunities in the traditional ways, notes Ho-Rivera. "Maybe they are [viewing] other platforms," she says. Today that could range from the very professional LinkedIn to the mostly fun like TikTok.

But it's more than how you recruit, it's what you do after that. "How interviews are conducted usually excludes a lot of people," Moss says. Ask candidates when scheduling the interview whether a traditional set up works for them.

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**"Sometimes, our idea of who is ideal leaves out people that would be truly brilliant. Maybe the best person is someone who might not have a natural social instinct but is a great listener."**

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Hermann says perhaps understand that some might be "more focused on walking around, [enhancing] learning about the organization, while having a more relaxed conversation." She says firms (and companies) need additional implementation, retention, management and hiring strategies to attract this oft-overlooked talent force.

Hermann says there are some simple things to do once the person is hired, too. "You want to create a work environment that is open to self-disclosure. That means the person ... providing information about what they need, and [then getting] support to be successful in the workplace, is only going to help the business," she says. "For example, maybe someone needs dim lighting or needs to wear headphones while they're working. Or they need to be able to take a 15-minute break. There are some basic strategies that can be put in place that really don't cost anything."

Offering flexibility in work styles can indicate a firm's broader understanding, too. "If you talk to some of my neurodivergent colleagues, they'll tell you that working remotely and this interconnected world has been a huge benefit to them," says Moss. "I know for some folks, it feels unnatural or difficult, but [we] have to keep in mind [that] for so many people, [it makes their jobs] a lot more accessible."





## ENSURING LEADERS ALSO LEARN

Like any successful endeavor, you need buy-in from the top. Herman says it can help to find someone within your firm who makes this an important focus to help keep efforts moving in the right direction. “There is always an ambassador in the organization who is really invested in this. Whether it’s for a personal reason or just professionally, they feel like this is going to benefit their company,” Herman says.

At Rogoway, Ho-Rivera notes they are doing diversity, equity, inclusion and accessibility (DEIA) training across teams — including the managing partner. “We’re very blessed here to have our managing partner’s full support to make sure that we’re always open to those requests and make our best effort to accommodate. [And it’s] not just because it’s what the law requires, but [it’s] the right thing to do.”

And remember, it doesn’t have to be perfect — but making an effort matters.

“I don’t think by advocating for neurodiversity in ... the legal industry we’re saying that we need to accommodate everyone. I don’t think that’s the end goal,” says Ho-Rivera. “We are advocating for more equity for neurodiverse individuals to not only have the opportunities to [have] a job and a career in the legal field but also that — within the team — they are going to be able to get a seat at the table.”

### ABOUT THE AUTHOR

**Wendy J. Meyeroff**, the Ghostwriter Who Grabs Attention, has been a reporter for numerous trade magazines for over 20 years, as well as a marketing consultant for numerous industry leaders.

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## 4 Ways to Nurture — and Retain — a Diverse Team of Associates

**Having a diverse, equitable, inclusive and accessible (DEIA) work environment is a core value that can and should become part of a law firm's DNA.**

When creating a DEIA-focused approach across the organization supported by programs and frameworks to implement, the retention and engagement level of a law firm's associates will improve, and authenticity will permeate the organization in many positive ways.

Many law firms excel at prioritizing the recruitment of diverse candidates, whether diverse means gender, race or other categories. For law firms, hiring objectives are probably the most common topic accelerating DEIA discussions.

However, hiring to increase diversity levels across the firm doesn't ensure that the firm retains those associates, especially as the industry continues to struggle with high turnover. Furthermore, in a recent Georgetown Law and Thomson Reuters Institute report, more than 900 law firm associates said those who appeared to be the greatest "flight risk" were more likely to be "women, of minority ethnicity, or from the LGBTQ+ community." Therefore, the firm's efforts need to go beyond hiring to include strategies that will emphasize the right practices across each stage of the associate life cycle, which typically includes attracting, onboarding, assigning cases, engaging, developing and rewarding.

### AN INCLUSIVE CULTURE IS THE DRIVER OF DIVERSITY

Diverse associates need more support once they join the firm in order to ensure they feel welcomed and included. To this end, the firm must intentionally create an inclusive environment where all associates feel a sense of belonging. Consider these four ways to address some strategies throughout the employee journey to attract,

“Diverse associates need more support once they join the firm in order to ensure they feel welcomed and included. To this end, the firm must intentionally create an inclusive environment where all associates feel a sense of belonging.”

engage, develop and retain associates. Included in these ideas are some of the ways that legal-specific talent management software and analytics can help manage these strategies.

### 1. Inclusive New Hire Integration

For a more holistic interpretation of traditional onboarding, try new hire integration — a structured program that supports new employees and prepares them sufficiently to work at the firm. Integration plans are useful to ensure that every associate who comes aboard has ample access to resources and opportunities to succeed. These plans can include introductions to the firm's leaders and mentors as well as invitations to selected events.

Once the integration plan has been established, the firm can then monitor associates' progress and collect feedback from both them and the team managing their integration. Employee integration software can be used for DEIA reporting and to review trends, spot potential issues, and uncover ways to make integration more inclusive and helpful to each associate.

### 2. Equitable Resource Allocation

Traditional law firm work allocation is usually subject to partners selecting associates to work on matters. But unconscious biases — such as recency bias, confirmation bias, proximity bias and more — can influence that process. There is an alternative way to do selection — an equitable resource allocation model, which uses objective measures (i.e., skills, competencies and goals) instead of proximity and familiarity. Using this approach, firms can expand opportunities offered to all associates for quality work/skills development.

Through technology, the firm can capture relevant data to achieve a more equitable resource allocation process. Software solutions can track associates' billable hours and productivity standards, automatically adjusting their workload — and its composition — accordingly. Technology solutions can also aid partners in assigning diverse teams of associates to legal matters so their combined, complementary skills will benefit the client being served.

### 3. Health and Wellness

Health and wellness for associates should be a priority for every firm, as burnout and depression are real problems affecting the legal industry.

In December 2022, ALM's Daily Business Review (DBR) reported that of lawyers who responded to an ALM Intelligence survey, more than 30% have felt depressed since 2019. More than half of the same respondents reported not being able to disconnect from work, feeling pressure from billable hours, lack of sleep, and client demands all contributed to a negative mental state.

Of course, since March 2020, the pandemic has had a distinctly negative impact on many workers' mental health, but this only underscores the need to overcompensate by providing support.

For associates, technology can keep track of their hours worked and gauge whether they are working multiple late nights and weekends. Firms should consider applying some flexible work models and practices where appropriate. These models can include time off if associates feel stressed or mentally exhausted, flexibility to work from anywhere for a defined period of time, or a full hybrid workstyle approach.

One silver lining of the pandemic was that firms successfully figured out how to work remotely. Keeping that flexibility available provides options for a hybrid, remote or global work location. For example, Aderant has a "Global Flexible Work" program that allows employees to work remotely from anywhere in the world for up to four weeks each year. Many employees take advantage of this program with no negative impact on their performance.

### 4. Unbiased Performance Management

Performance evaluation is a standard part of management, but it is susceptible to bias and can leave associates "in the dark" about their performance between evaluations. Instead, implement a continuous feedback approach, which allows for constant coaching and development conversations and eliminates that "surprise" element in the annual performance evaluation. This also ensures that associates' annual performance evaluations fairly reflect their year's work.

With real-time feedback software, firms can easily review evaluation and feedback history. Firms can spot trends among associates, allowing them to pinpoint and correct issues as soon as possible. Real-time feedback also identifies areas for DEIA improvement with regular check-ins on associates, including pulse surveys and self-reflections.



## AN INCLUSIVE FIRM IS BETTER FOR ASSOCIATES — AND THE WHOLE FIRM, TOO!

Law firms, and almost all other companies today, are continually growing and maturing their culture to be inclusive, diverse and authentic. By being intentional and setting ambitious DEIA goals while taking concrete action to achieve them — as well as leveraging talent management software and analytics to manage their efforts — firms can nurture a diverse team of associates and create an inclusive culture that successfully develops and retains associates and helps their business grow.

### ABOUT THE AUTHOR

**Shira Aharoni** is the Chief People Officer at Aderant. She is a passionate people advocate, with extensive experience leading people teams and talent strategy. Prior to joining Aderant, Aharoni held HR leadership roles in the software and technology space in global, leading companies in the private and public sectors across product, technology, sales and professional services divisions. Her mission is to create an inclusive work environment where everyone feels they belong and can grow and develop their skills while driving business growth.

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**HEIDI K. GARDNER, PhD**  
Co-Founder, Gardner & Co.

**CSILLA ILKEI**  
Insights Director, Gardner & Co.

“To collaborate smarter, leaders and their colleagues need to understand where their problems lie.”

## Is Your Firm Ready for Smart Collaboration?

**You and your colleagues know you need to collaborate to generate better outcomes, but don't know how to start. Or you think you know how to proceed, but this approach isn't grounded in data (our research indicates this is a very common problem).**

To get a firm grip on your collaborative starting point, we recommend conducting a diagnostic (or assessment) to unveil the top barriers to collaboration. Here are three possible layers of this diagnostic:

- » A top-level organizational assessment of smart collaboration strategies, systems and mindsets
- » A leader/midlevel diagnostic
- » An individual diagnostic

### WHAT IS SMART COLLABORATION AGAIN?

The new book, *Smarter Collaboration: A New Approach to Breaking Down Barriers and Transforming Work*, makes it clear that collaboration is not a “soft topic.” Instead, smarter collaboration is the intentional bringing together of the right people at the right time to achieve better outcomes than anyone could achieve on their own. Based on over a decade of research at Harvard, these results include higher revenue and profit, better talent engagement and retention, faster innovation, deeper client relationships, lower risk and more efficient processes.

To collaborate smarter, leaders and their colleagues need to understand where their problems lie. This can be achieved through a companywide diagnostic, which gives people a clear-eyed, data-driven view of their collaborative starting point. Then they know where to spend their energy — and more importantly, how to direct others to do the same.

In our experience, working in multiple organizations across the globe, this diagnostic sets leaders up for success in six ways:

- » Aligning their efforts to the business strategy
- » Helping leaders diagnose the perceived and actual barriers to collaboration
- » Discovering and analyzing “bright spots” where collaboration already happens
- » Generating compelling evidence about the potential upside of making changes
- » Building in the customer’s perspective
- » Setting priorities based on the findings

Two approaches to the diagnostic are possible: conducting it internally, or using an outside provider who (in some cases) could also perform an official financial analysis of smarter collaboration’s potential monetary advantage.

## A LEADER/MIDLEVEL DIAGNOSTIC

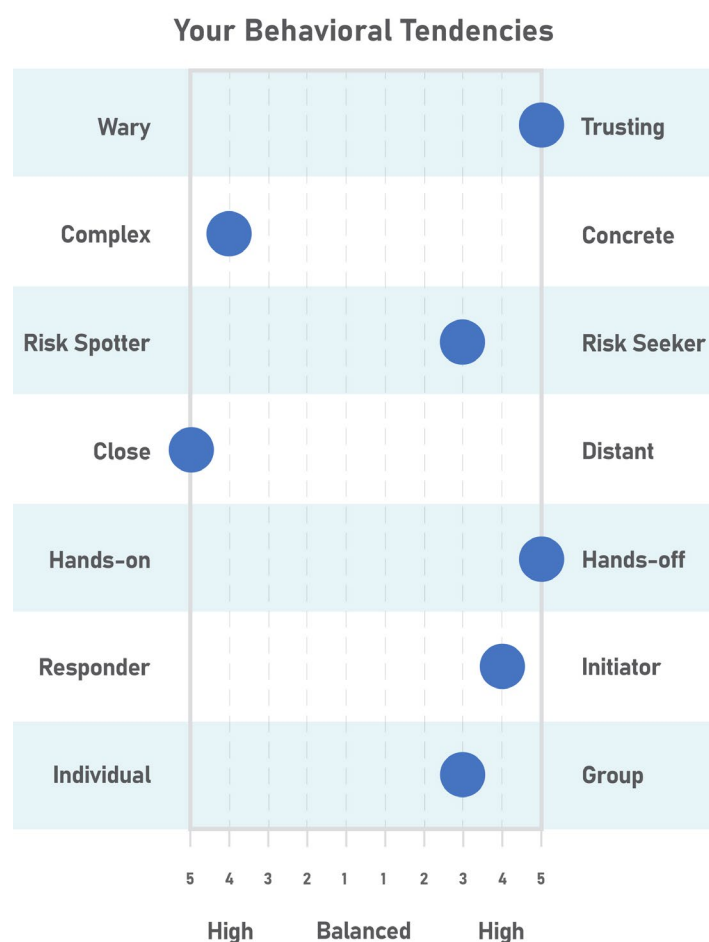
The diagnostic just described could be applied to a particular department, office or cohort (for example, partners, senior associates or administrators). Another option is running a psychometric assessment to determine the mix of collaborative tendencies within a particular group. Then you will know what kinds of collaboration skills and styles are lacking. Collaboration is most fruitful when an issue is viewed from many different angles — including knowledge domains, life experiences and ways of thinking and behaving.

To understand the balance of predispositions in a group, members might take an assessment like the Smart Collaboration Accelerator. After answering a series of questions, respondents see how they fall along several spectrums; then, these results can be combined into a group report.

For example, this report might indicate that a team is dominated by trusting individuals and would benefit from some “wary” members who are likely to spot potential risks involved with a new client or partner. The next step is determining how to acquire these resources as well as how to make sure all perspectives are being heard.

## AN INDIVIDUAL DIAGNOSTIC

A psychometric evaluation can also be applied to individuals — in fact, this is the first step before a team view is compiled. People look at the results of their assessment to pinpoint



where they fall in the different dimensions. With this better understanding of their natural inclinations, they can use them as strengths to foster smarter collaboration. The graphic below gives an example of an individual’s profile using the Smart Collaboration Accelerator methodology.

Ideally, one’s leanings provide for comprehensive looks at problems within groups. Knowing them also allows people to avoid taking their tendencies to the extreme. This often happens in times of stress, for example. People find it easier or more efficient to go it alone, and then they over-rely on particular characteristics. (For instance, they become ultra-distant from colleagues versus giving them a healthy dose of space to do their work.)

Legal administrators are well-positioned to drive collaborative initiatives in their organization. They have the opportunity to play a leading role in kickstarting and conducting a collaboration diagnostic — either at the organizational, team or individual level. This lets them diagnose the top barriers to collaboration, engage with the highest level of leadership based on the findings and help launch the needed initiatives.



## LEARN MORE ABOUT COLLABORATION!

Heidi Gardner, PhD, recently joined *Legal Management Talk* to discuss the importance of collaboration, her new book and what qualities make a good leader in the post-pandemic era. Make sure to tune in! [alanet.org/podcasts](http://alanet.org/podcasts).

### ABOUT THE AUTHORS

**Heidi K. Gardner, PhD**, is a sought-after adviser, keynote speaker and facilitator for organizations across a wide range of industries globally. Named by Thinkers50 as a Next Generation Business Guru, she is a Distinguished Fellow at Harvard Law School and former professor at Harvard Business School. She is currently the faculty chair and instructor in multiple executive education programs at both institutions. Gardner works extensively with her team at Gardner & Co., partnering with boards, executive teams and other senior leaders to boost performance by embedding the principles and practices of smarter, agile, cross-silo collaboration within those groups and across the broader organization and ecosystem. Her latest book with Ivan A. Matviak, *Smarter Collaboration: A New Approach to Breaking Down Barriers and Transforming Work*, offers more ideas on cultivating smarter collaboration.



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**Csilla Ilkei**, Insights Director at Gardner & Co., is an international thought leader in translating science-backed research into pragmatic plans. During her more than 20 years as Global Manager and Knowledge Leader at McKinsey & Company, she was instrumental in unearthing global economic, business and industry trends. At Gardner & Co., she rigorously researches, meticulously designs and skillfully leads programs for C-suite executives.



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**MANUEL SANCHEZ**

Information Security and  
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iManage

“Since a good document management system (DMS) has robust security and data governance controls, the failure to integrate it into the wider company threat monitoring strategy means that valuable real-time information and alerts related to documents and emails residing in the DMS are missed out.”

## Sliding into Your DMS

**They say that nothing in life is certain except for death and taxes, but legal organizations can add another truism to the stack: Ransomware and other types of cyberattacks will only continue to increase in frequency and severity.**

According to Juniper Research, more than 33 billion records will be stolen by cybercriminals in 2023, which represents an increase of 175% from just five years ago. Additionally, Kaspersky Labs reported that during the first 10 months of 2022, the proportion of users attacked by targeted ransomware doubled compared to the same period of 2021 — a trend line that does not bode well for 2023.

Amid this surge, legal organizations — not surprisingly — continue to be popular targets for these types of attacks. Meanwhile, flexible working models — which have dispersed professionals from an office environment where all daily business was conducted on company-approved devices behind the corporate firewall, to a “work from anywhere on any device” situation — have only added to the degree of difficulty in keeping sensitive data secure.

### AN ORCHESTRATED RESPONSE, AND AN UNINTENDED GAP

Given this formidable array of security challenges to contend with — not to mention a persistently tight labor market — it’s no wonder that those tasked with protecting company and client data are feeling overburdened and under an increasing amount of pressure.

In response, many organizations have started investing in security orchestration to help improve the efficiency of their internal security controls. The primary benefit of security orchestration is that it allows previously siloed tools used to detect and respond to security incidents to be connected. This approach unifies and automates multiple aspects of security — from threat alerts and monitoring to remediation.

When it comes to orchestration planning, however, one essential component is often ignored: integration with the organization’s document management system (DMS). This oversight has the unintended effect of creating a gap in the organization’s security

response — one that centers around the system where the vast majority of law firms and corporate legal departments keep their sensitive and privileged information.

Since a good DMS has robust security and data governance controls, the failure to integrate it into the wider company threat monitoring strategy means that valuable real-time information and alerts related to documents and emails residing in the DMS are missed out.

## A CHANGE OF VIEW

So, how can we best close this gap and bring the DMS into the fold?

A good first step is a change of mindset around how the DMS is viewed within the organization. Traditionally, IT focuses on monitoring the systems that fall into the “infrastructure” bucket (e.g., the email system, endpoint devices, private cloud and so on) while more specialized applications like the DMS are seen as being “owned” by the particular team, department or practice group that purchased them or uses them the most.

The downside of this segmented approach is that alerts generated by the DMS when certain user behavior deviates from what is considered normal are sent to a point person within that team or practice group rather than to those with a global view of the organization. The obvious concern: Does the point person know what to do when they receive an alert and whom to escalate it to?

An employee who is leaving the organization and is serving their notice period may decide to create a “backup” of all the files they worked on during their employment because they feel that these belong to them. The activity triggers an alert in the DMS, as the files contain sensitive content such as client information. To reduce the risk of data loss, organizations

would want to ensure that this type of alert reaches their central threat monitoring system as soon as it is generated. Alternatively, an alert could be generated by the DMS when a user accesses confidential documents from projects that they are not working on. This could be the product of a bad actor who has their hands on stolen user credentials.

The important point is that those responsible for protecting business information across the organization should be alerted of any anomalous behavior surrounding the DMS so that they can investigate and take action, as they would do for any attacks to the company network.

## EVERYTHING WORKING TOGETHER

Legal organizations should make sure that whatever DMS they’re using, it can easily “talk to” the organization’s integrated security stack. Industry-standard services such as REST APIs are crucial here, ensuring that DMS alerts can be integrated into the Security Information and Event Management (SIEM) tool, for instance.

When different products are seamlessly working together in this manner, organizations can fully embrace the benefits of security orchestration, leaving behind manual processes in favor of an automated and integrated approach that encompasses important systems like the DMS. Only this comprehensive course of action will do for legal organizations that want to effectively protect their sensitive data from the security challenges that are part and parcel of today’s business landscape.

### ABOUT THE AUTHORS

**Manuel Sanchez** is the Information Security & Compliance Specialist at iManage.

 [imanage.com](https://www.imanage.com)

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# Anniversaries, Awards and Appointments

## Members on the Move »



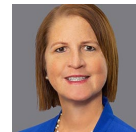
**Luis Aguayo (not pictured)**, an independent member, is now Office Manager at Hirschfeld Kraemer LLP in San Francisco, California.



**Vivian Arias**, a member of the Greater Los Angeles Chapter, is now Firm Administrator at Law + Brandmeyer LLP in Pasadena, California.



**Erik Carrozza**, a member of the Independence Chapter, is now Chief Financial Officer at Kessler Topaz Meltzer & Check, LLP, in Radnor, Pennsylvania.



**Judy Harris**, a member of the Suncoast Chapter, is now Chief Operating Officer at Trenam Law in Tampa, Florida.



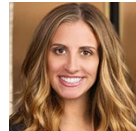
**Anna Johnson (not pictured)**, a member of the East Bay Chapter, is now Office Administrator at Steven Adair MacDonald & Partners, P.C., in San Francisco, California.



**Daniel Ludwig**, a member of the Maryland Chapter, is now Office Manager at Baxter Baker Sidle Conn & Jones, PA, in Baltimore, Maryland.



**Kate MacArdle**, a member of the Independence Chapter, is now Practice Support Manager at Ballard Spahr LLP in Philadelphia, Pennsylvania.



**Stefanie Marrone**, an independent member, is now Director of Business Development and Marketing at Kaplan Hecker & Fink LLP in New York, New York.



**Quency Perkins, SHRM-CP**, a member of the Houston Chapter, is now Firm Administrator at Williams Hart & Boundas, LLP, in Houston, Texas.



## Sending Our Condolences

ALA is saddened by the passing of **Christine Nugent**, who joined ALA in 2015 as a member of the Philadelphia Chapter. You can read her obituary at [bit.ly/42ZA1xv](https://bit.ly/42ZA1xv), and her family requests donations are made to St. Jude Children's Research Hospital in her memory. We send our condolences to Christine's family, friends and colleagues.

ALA mourns the passing of **Janet Wennberg**, who joined ALA in 2004 and was most recently New York Office Manager at Fish & Richardson, PC. You can read her obituary at [legcy.co/3Gcy8DB](https://legcy.co/3Gcy8DB). Her family requests that donations be made to the Ovarian Cancer Research Alliance. We send our condolences to Janet's family, friends and colleagues.

ALA also mourns the passing of **Kelly Dunkum Higgs**, who joined ALA in 1999 and worked at McCandlish Holton in Richmond, Virginia, for 27 years. You can read more in her obituary at [bit.ly/3KxqICY](https://bit.ly/3KxqICY). Donations can be made in her memory to the Cloverhill Church. We send our condolences to Kelly's family, friends and colleagues.

# What's Happening at Headquarters

## We Want to Hear From You: What Makes a Good Leader?

It's easy to identify bad leadership. We've all experienced it. But we want to know what makes a good leader — the type who motivates you to be your best self. This year's print issue of *Legal Management* attempts to tackle that question by exploring all things leadership. And we want to hear directly from you!

Here's how to participate: In 75 words or fewer, tell us what qualities make a good leader. What's the best piece of leadership advice you've ever received?

Here's an example: "When I was 24, I was fortunate to have a mentor who instilled in me the value of admitting to my mistakes. We all fail at times, but good leaders will own their failures and grow from them."

Please email your responses to [vdanner@alanet.org](mailto:vdanner@alanet.org) by Friday, May 5. Submissions may be edited for clarity.



## Congrats to This Year's Student Scholarship Recipients!

The Foundation of ALA is pleased to announce the recipients of the 2023 Student Legal Scholarship Program:

- » Megan Aceves, Arizona State University
- » Kenwanic'ahee Kravitz, Arizona State University
- » Leslie Thomas, Florida State University

Best of luck to these students in their future careers in the legal industry. Thank you to SurePoint for sponsoring this program!

## Become a Mental Health First Aider

Our popular Mental Health First Aid Certification Program is taking place again this summer! The program is an interactive training course comprised of 2-hours of self-paced content (to be completed online independently prior to the live session) and one 6.5-hour instructor-led session over Zoom. The one-day training program will be offered on four separate Fridays in June and July.

Due to the interactive nature of this course, there is a maximum of 30 participants per offering, so register now by visiting [alanet.org/mhfa](http://alanet.org/mhfa)! Attendees are eligible to receive 7.5 credit hours toward their CLM certification.





# What's Happening at Headquarters



## Plan Your Days at ALA's 2023 Annual Conference & Expo

Get excited! There's less than a month until ALA's Annual Conference & Expo, taking place May 7–10 in Seattle, Washington.

With many engaging presentations, networking opportunities and the chance to interact with ALA's VIPs and business partners, now is the perfect time to plan out your schedule — before all the fun starts!

If you haven't registered yet, now's your chance! Be sure to visit [alanet.org/conf23](https://alanet.org/conf23) to meet the speakers, browse the schedule and register. See you in the Emerald City!

## Check Out the Latest Podcast Episodes

Are you struggling to keep up with client billing guidelines? Or trying to relieve the stress of hybrid work? Tune in to the newest episodes of *Legal Management Talk*, including:

- » Managing Your Mindset with Laura Terrell
- » Successfully Navigating Client Guidelines with Andre Wouansi
- » Conquering Business Development with David Freeman, JD

Tune in by visiting [alanet.org/podcast](https://alanet.org/podcast).



## Don't Miss the Upcoming ALA Webinar: Corporate Storytelling: Getting Lawyers to Give You What You Want

In this busy day and age of instant communication, you get one shot at getting what you want, when you want it and how you want it. Additionally, getting lawyers to pay attention to your emails and respond quickly can be frustrating, daunting and time-consuming. This webinar can help you change how lawyers, colleagues, clients and supervisors will now view you as a leader in your field. Learn how to persuade lawyers, supervisors and direct reports to view you as an important authority whose communications need to be acted upon immediately. You don't have to be at the top of the org chart to make people sit up and take notice. Join Chere Estrin, Chief Executive Officer of Estrin Legal Staffing, on **April 26 at 2 p.m. Central** by registering at [alanet.org/upcoming-webinars](https://alanet.org/upcoming-webinars).