

LEGAL MANAGEMENT

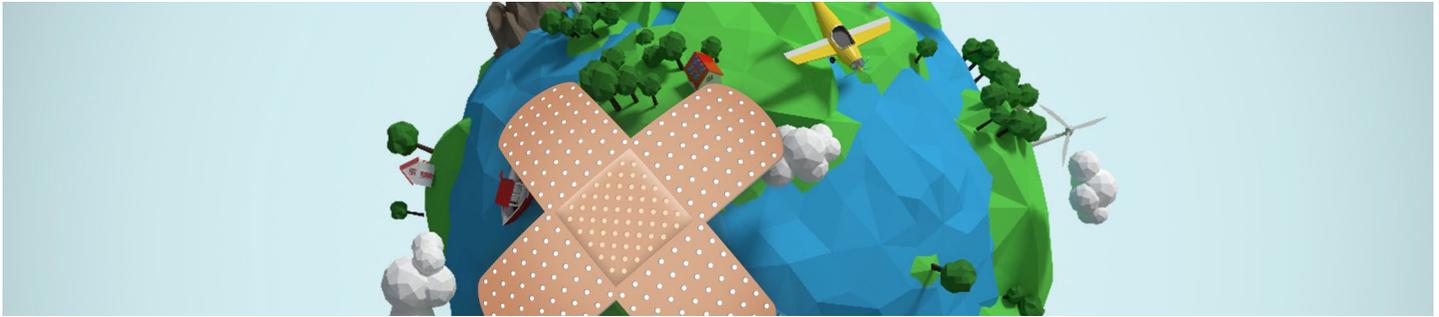
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Social Impact

One legacy of 2020 may be how legal organizations shift their focus more on social responsibility.





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DEBRA L. ELSBURY, CLM
2020–2021 ALA President
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“As an Association, we also have much to celebrate in 2021 — specifically, our Association’s 50th Anniversary. We have some fun things in store to celebrate this golden milestone, so stay tuned!”

Looking Back To Move Forward

Happy New Year! I cannot remember the last time I was so excited to say those three little words. I am not one to wish my life away, but I will not miss the curveballs and challenges 2020 threw at us.

Much has been written about the challenges of 2020, and we will feel its effects forever — some negative, some positive, but all will change the course of business as usual. If you are one who tends to reflect on the past year and make resolutions for the new, what a great time for you to hit the reset/restart button and pay attention to what 2020 has taught us.

One of the lasting impacts of 2020 is featured in our cover story, “Social Impact.” Finding ways to be more socially responsible is nothing new for many legal organizations. Beyond the personal learning that will be required as we continue to heal and grow, these initiatives are no longer seen as optional. The lack of such efforts in your legal organization might be a dealbreaker for some clients as more require their counsel to articulate their social impact commitment as part of the selection process.

Are you ready to up your commitments in this area? Are you prepared to do so? What could new initiatives look like? If you find yourself asking these questions, this article can help you expand your organization’s efforts — or take the first step to get started. You will be inspired by what some firms are already doing. This article highlights a new resource, Legal Sustainability and Social Impact (Legal SASI). It was actually launched in response to growing interest in social responsibility from the legal profession.

LOOKING AHEAD

As an Association, we also have much to celebrate in 2021 — specifically, our Association’s 50th Anniversary. We have some fun things in store to celebrate this golden milestone, so stay tuned! You will also receive a keepsake print edition of *Legal Management* this summer that not only highlights the last 50 years of our Association but also gives a sense of where our industry is headed in the next 50 years.

In the vein of resolutions and future planning, your Board of Directors is also at work on a new Strategic Direction and Plan. This month we are starting the process to chart the course of this Association for the next three to five years. The lessons of 2020 have provided insights about the association world that we could not have imagined in years prior. Just as in our professional lives, ALA found itself in uncharted waters without navigation tools. We were challenged to provide education and networking in ways never before utilized. All this work has paid off and given us a new set of skills and abilities that will impact our new plan.

I am excited to see what the new year will hold. I am excited to see answers to action in response to the social impact on our personal and professional lives. I am excited to see how you,

the member, have risen above and excelled. I am excited to see the next steps for this Association. Mostly, I am excited to be alive in a time of significant change.

Here's to a fantastically successful 2021 — that finds you happy, healthy and strong.

As always, it is my pleasure to serve with you and for you.

 Debbie@threlkeld-legal.com



The banner features a blue background with gold streamers and a circular logo in the top left corner. The logo contains the text 'Association of Legal Administrators', '1971-2021', '50th ANNIVERSARY', and the ALA logo. The main text is in white and gold, and there are two call-to-action sections with icons.

HELP
celebrate
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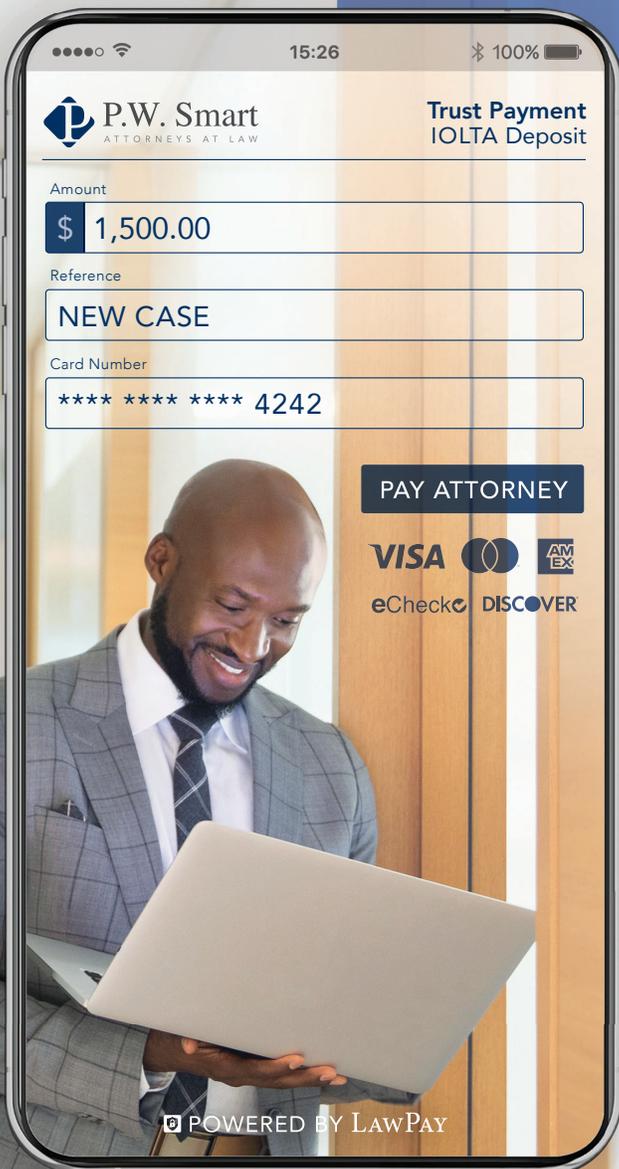
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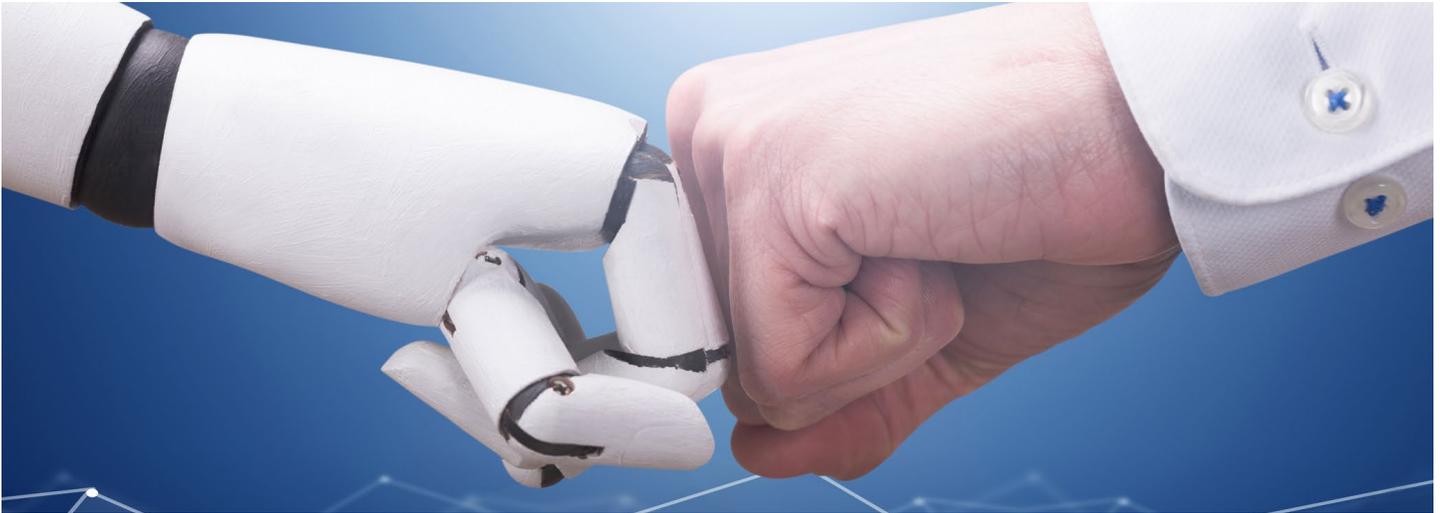


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NICOLA STOTT
Chief Executive Officer
Exigent

“The reason so many law firms and departments are using artificial intelligence CM is that it accelerates the journey along the contract management maturity model (CMMM) at a pace that simply isn’t achievable with traditional CM.”

How AI Is Accelerating Progression Through Contract Management Maturity

While we’ve all been looking forward to 2021 since March, most law firms and corporations are only now in full planning mode — albeit maybe not quite the planning they were expecting.

But if there is a silver lining to 2020, it’s that we now know we can achieve amazing things when we have to, thanks in large part to technology. Whether it’s remote working, shared drives, Zoom calls or just the ability to connect daily with colleagues, technology has come of age this year.

This newfound acceptance of technology — especially among previously reluctant lawyers and legal management professionals — has catapulted technology to the top of 2021 priorities when it comes to planning for growth and development.

Plus, your firm can apply technology to so many areas of work. But where to start? And which is most relevant to your firm and likely to yield the maximum benefits, both strategically and to the bottom line?

As a cornerstone of legal, contract management (CM) should be high on the list. According to a study from the independent International Association for Contract & Commercial Management (IACCM), poor CM can cost organizations up to 9% of annual revenue — and in 2021 every penny will count.

Traditional CM, while undoubtedly beneficial for your business, has been eclipsed by contract lifecycle management, particularly artificial intelligence-focused (AI) CM. Despite the hyperbole, AI CM is a reality that’s living up to the hype.

The reason so many law firms and departments are using AI CM is that it accelerates the journey along the contract management maturity model (CMMM) to a pace that simply isn't achievable with traditional CM.

The CMMM is a benchmark that's designed to help organizations understand where they are in their CM journey. Before you benchmark yourself on the stages below, ask yourself the following questions:

- » How many contracts does your organization have?
- » How many of them are held with you?
- » Can you locate at least 50% of your contracts right now?
- » Can you answer simple questions about risk exposure?

Now use the levels below to benchmark where you are on your CM journey and find out how AI CM can help.

LEVEL 1: UNDEFINED AND UNPREDICTABLE

Your contracts are undefined, and there may be poorly written informal agreements. At worse, they do not conform to industry standards or lawyers have not reviewed them.

How AI CM can help: Bringing your contracts into a single repository will facilitate your journey along the model. AI CM helps expedite the migration process into a single place ready for extracting value.

LEVEL 2: LOCALLY MANAGED

Basic processes are in a place where contracts are drafted, reviewed, managed and stored locally. Individuals manage critical contracts, and once contracts have expired, they are archived locally and accessible to key local personnel.

How AI CM can help: There's little value from your contracts at this stage. AI can increase productivity by pulling all contracts with specific dates, clauses or terms and conditions to save manual time.

LEVEL 3: DEFINED AND DECISIVE

Templates, central repository and review processes are in place. At this level of maturity, using an integrated CM tool is recommended.

How AI CM can help: Companies at this stage are most likely using AI CM. To progress further, the AI can be used to extract and analyze contract data to help decision-making.



LEVEL 4: PROACTIVE AND PROFITABLE

Contracts can be tracked centrally, anywhere, anytime and from any device. True risk management processes can be implemented. Alerts are built with agreed triggers, and compliance audits are made, including cross-department plans.

How AI CM can help: This means your company is already using CM AI. At this stage, advanced business analytics can help you take familiar contract terms and give them commercial value.

LEVEL 5: CONTINUOUS IMPROVEMENT, CONTINUOUS BENEFITS

Not many organizations make it to this level. However, it's one of the easiest to sustain because the groundwork is done. Once maintained, the benefits are exponential.

How AI CM can help: At this stage, you can use your contracts to extract real commercial value, predict which future contracts are high risk and use AI to conduct a full ongoing risk analysis.

Realistically, most law firms and departments are stuck at stages one or two, but prioritizing progression through the model as part of 2021 planning will have far-reaching commercial and legal benefits. It will be those organizations who invest in understanding and using the technology now that thrive, not just survive, in 2021 and beyond.

ABOUT THE AUTHOR

Nicola Stott is Chief Executive Officer of Exigent. She co-founded a global organization that quickly grew from one to over 15 service lines. With "anything is possible" as a mantra, her determination and energy are infectious, making clients excited about the possibilities of change and leaving them empowered to take the first step.

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**2021
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JIM PRICHARD
*Managing Partner
 Ball Janik, LLP*

How One Firm Enjoyed a Year of Growth in 2020

Few people would say they were sad to see 2020 come to an end. We have learned much during this year in our industry, and as we continue to battle against a once-in-a-century pandemic, adapting to a world that looks exceptionally different than it did just 10 months ago.

At Ball Janik, we consider ourselves fortunate to have grown stronger together despite the pandemic — and perhaps even because of it. This is attributable to some specific initiatives and business decisions, our hardworking employees, the many resources ALA offers, and a culture at our firm that nurtures innovation to drive us forward. We are writing to offer lessons learned and a message of hope to the ALA community as we move forward into 2021.

Well before the pandemic, Ball Janik and Elevate Technology Group teamed up to assess the firm’s use of technology among its coast-to-coast offices. We used the findings to implement new solutions centered around security, productivity and performance. Thanks to this analysis, we made dramatic changes that helped facilitate faster data access no matter where our personnel were working. Consequently, we were able to bolster our cybersecurity posture and develop continuity plans to keep the firm operational in a disaster.

“We shifted to a [work-from-home] model almost overnight,” says ALA member Heather J. Oden, the firm’s Chief Operating Officer. “It was important to us to make our employees comfortable, so we did our best to mimic their work environment by sending chairs, floor mats, standing desks and extra monitors to those employees who needed them.”

“
 We are writing to offer lessons learned and a message of hope to the ALA community as we move forward into 2021.”

Our marketing team was largely instrumental in successfully digitalizing our many offerings. They not only researched and implemented platforms for usage, but also came up with innovative ideas to keep our clients and audiences engaged in our services and offerings. They fully transitioned educational courses and events entirely to digital and did the same with client and internal team meetings.

As a result of these drastic yet necessary changes, 100% of the marketing budget went to digital efforts and resulted in our website traffic going up by 24% and our social media engagement skyrocketing by a whopping 1,400%. By integrating polished webinar software and being at the helm of fostering ideas for the industry trade organizations, our marketing team focused on providing valuable information in newly enhanced platforms.

Ball Janik relied on the many resources offered by ALA, including *Legal Management*, virtual events and other educational platforms. We also partnered with several ALA members to brainstorm in a safe space on how to best address the many changes we are all facing.

These innovative initiatives, coupled with a culture that embraces efficiency mining, allowed our bicoastal firm to thrive during 2020. Today, we continue to adapt and improve our use of technology thanks to internal focus groups that share lessons learned about what works well and what needs to be improved. The challenge to innovate has been set before us and our people have embraced this challenge in incredibly

thoughtful and creative ways. The firm is reaping the benefits of this innovation in many ways we did not anticipate at the beginning of the year.

We owe much of our success to our employees. During this time of change, we remain close by, communicating often and staying involved in one another's lives. We also placed a greater emphasis on mental health and well-being by offering expanded mental health services through our provider. Additionally, we have a robust Women's Leadership Initiative that meets regularly and helps our female employees to support one another.

As we look ahead to 2021 and leave 2020 behind, we at Ball Janik are focused on the continued evolution of our firm. We plan to move forward with the belief that we are all headed toward greater things in the years ahead, and we will act accordingly. We continue to focus on efficiency and continuously improve our operations. We remain extremely thankful to all the wonderful people who helped us enjoy a magnificent year, and we can't wait to see all the great things we will continue to accomplish together. We are and continue to remain #BallJanikproud.

ABOUT THE AUTHOR

Jim Prichard is Ball Janik LLP's Managing Partner and he maintains a broad practice in all aspects of construction, hospitality and real estate law.

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“
From my perspective,
successful performance
is best viewed on a
spectrum for all attorneys
— not with a binary
'good/bad' lens.”

Problem Partners

Help your firm leadership shift from underperformers to productive team members.

All firms have it. Firm leaders wish it would correct itself, but it won't. Underperforming partners are a pain point for many firms.

As professional advocates, attorneys refrain from showing weakness. This exacerbates the problem, as underperformers avoid asking for help and firm leaders avoid addressing the issue. But in your role you can help your firm leadership step up and address these issues.

The first step in the process is to understand why a partner begins to slip. For every individual attorney there is a unique reason and backstory for their issues. In your role, you can help uncover what is happening.

“It may be that the person was always an underperformer, but it had gone unrecognized due to the fact that others were bigger concerns,” says John Harrity, Managing Partner of Harrity LLP. He further explains that there are levels of underperformance, and as the lowest performing attorney leaves, the next lowest performing attorney moves to the bottom of the list.

Thomas S. Tripodanos, Managing Partner of Welby, Brady & Greenblatt, LLP, also suggests the underperformance issues might stem from the attorney feeling as though management isn't invested in them. He adds that the obvious outcome is that they are not invested in the firm, so their productivity recedes.

There is also another common culprit causing the problems: inability to change. “There are some folks who have embraced change, but there are the ones who are resistant,” says Jack Greiner, Managing Partner of Graydon Law. “Their lack of change can impact client relationships, especially when it comes to retaining the client.”

Erin Rhinehart, Co-Managing Partner at Faruki PLL, adds, “In my experience, partners (voting and nonvoting) underperform when business slows, skills fatigue, accountability is lacking, there are interpersonal issues among the partnership and leadership transitions.”

No matter the reasons, there are generally three main categories for falling behind: situational issues, practice issues and age-related issues. Unfortunately, most firm leaders manage generically, says Gerry Riskin, Founder of law firm consultancy Edge International. “They apply a measurement to an entire class [of attorney] rather than looking at each person individually.”

But it’s important to understand what is happening with the individual underperformer to help them improve. A good place to begin is by helping your leadership identify which category the poor performers fall under by asking the right questions around the issues.

UNCOVERING THE UNDERPERFORMANCE REASONS

It’s important to remember that people are unique. There is no one-size-fits-all approach. “From my perspective, successful performance is best viewed on a spectrum for all attorneys — not with a binary ‘good/bad’ lens,” says Thomas Tupitza, President of Knox McLaughlin Gornall & Sennett, P.C.

Situational issues, which is the first category for falling behind, are events or changes to the partner’s standard operating procedure. If the partner does not have a plan to address a situation, they can begin to flounder.

The COVID-19 pandemic is an extreme example of a situational issue that no one had a plan to address. It caused some practice areas to surge and others to fade. Therefore, underperformance might become an issue with attorneys who have always been productive.

Some other situational issues that might happen include:

- ✔ Loss of major client(s)
- ✔ Market driven change
- ✔ Firm standards increasing over time

Greiner also points out a partner might have trouble if a great client relationship they’ve had for a while goes away — they can find it hard to adapt. It’s common when the general counsel changes and there is limited time to build a new relationship before work is transferred to another firm. To address situational concerns, guide the firm to offer proper support to help the attorney overcome whatever it is that has impacted their practice.

“When a partner begins to handle the strategic parts of a case, they spend less time in [the] weeds. This might cause them to lose confidence in their own skills because they have not kept up to date.”

Practice issues can also arise when the partner fails to stay on top of their own career. They look up one day and realize they are not practicing in the area they want, they are not at the level in the firm they desire, or they see their area of practice is no longer needed. Harrity says an attorney may begin to underperform because they’ve lost interest in their job.

Some of the issues the partner could be facing include:

- » Failure to reinvent skills
- » Failure to progress
 - Stalled out midcareer
 - Lack of business development or client service mindset/skills
- » Burnout
- » Comfort/complacency

“Skill fatigue” might be the root of the issue, too, according to Rhinehart. “When a partner begins to handle the strategic parts of a case, they spend less time in [the] weeds. This might cause them to lose confidence in their own skills because they have not kept up to date.” Often firms create their own practice issues by promoting attorneys into partnership levels when they lack the drive or ability to be a productive partner.

A trickier issue to address can be the ego and self-identity that drives many lawyers to stay in practice long after they should. It can be a barrier to proper succession planning for the firm, too. In fact, it’s reported that over 50% of partners in law firms are 55 or older.

Age-related issues are just as daunting to overcome as situational and practice issues. The following are a few to consider:

- » Transition of client relationships
- » Financial setbacks and recession stretching out retirements
- » Ego preservation
- » Life-driven changes

“Twenty-five years ago, the perception of what it meant to practice was different. Some partners either can’t retire or are reluctant to retire due to financial pressures,” says Riskin. His mantra for these scenarios is to “help them find their value.”

He tries to guide attorneys toward another focus, such as a mediation practice, that requires a certain skill set that does not necessarily mature until someone has been in practice for a while. Riskin stresses that opportunities are still available to these partners beyond the firm’s walls.

When addressing issues that fall in the age-related realm, you must heighten everyone’s awareness not to cross the line with any discriminatory comments or actions. But having these conversations is important, especially when it comes to discussing next steps for the firm beyond the partner.

ADDRESSING THE ISSUE

Whether it’s caused by situational issues, practice issues and age-related issues, chronic underperformance can be a blow to a partner’s career. If they are not equipped to manage the problem, they can fall victim to a downward spiral. Without the firm’s support, training and guidance, partners who are suffering from any of the above might not know how to proceed. Help your firm leadership determine the root cause of the poor performance and then help the partner address it.

“A leader who thinks [financial] punishment is effective is delusional,” says Riskin. “The motivation is not money.”

Reduction in compensation is not a solution; countless management studies have proven this to be true. Regrettably, 90% of firms will reduce compensation to address the issue, and 39% will de-equitize the partner, according to Altman Weil’s 2019 Law Firms in Transitions Survey. Further, the survey reports that 61% will remove the partner from the firm in the end.

When addressing issues that fall in the age-related realm, you must heighten everyone’s awareness not to cross the line with any discriminatory comments or actions. But having these conversations is important, especially when it comes to discussing next steps for the firm beyond the partner.

It’s time to shift firm leadership away from punishing and toward coaching. “When a lawyer who has a history of performing well slides into poor performance, you need to have candid discussions without being threatening or irritated,” says Mickey Maher, Managing Partner of Hecht Solberg Robinson Goldberg & Bagley LLP. “Something has led to the poor performance, and it’s the manager’s role to get at the root cause and fashion a solution.”

Your leadership might not know how to work with a poor performer, but you can coach them to be coaches. Before the managing partner or practice leader starts coaching, gather information from the offending attorney’s colleagues, direct



reports and, if appropriate, clients. Prepare financial data and a list of resources for the firm leader to refer to if necessary. The next critical step is to teach the firm leader how to effectively coach. The following will help you guide them:

1. Show the coaching partner how to be a good listener.
2. Ask the partner to help the underperformer look for ways to solve their own problems.
3. Have the coaching partner share resources.
4. Support the coaching partner in setting targets/goals with the underperformer.
5. Celebrate success.

It is difficult for some people to ask for help, especially attorneys. Your firm leaders want to help those they see in distress, but sometimes they lack the skills or experience to handle difficult conversations.

But you can support both the leaders and the underperformer during this stressful process.

Once an underperforming partner sees their progress, they will be motivated to put energy back into their practice and into the firm. It’s a benevolent way to move your problem partners to productive partners.

ABOUT THE AUTHOR

Sharon Meit Abrahams, EdD, is a legal talent expert who has coached hundreds of attorneys over the past 25 years some of which used to be underperformers. She coaches firm administrators on how to coach their own attorneys.

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PAULA TSURUTANI

Freelance Writer and Editor

“With so many people newly out of work or underemployed, [Novack and Macey LLP] naturally identified hunger as one of the greatest needs and responded by making our largest-ever donation to the Greater Chicago Food Depository.”

Social Impact

One legacy of 2020 may be how legal organizations shift their focus more on social responsibility.

A public health crisis. Widespread civil unrest. Calls for social justice and systemic change. This backdrop of tensions over the past several months has prompted an examination of social responsibility commitments among many law firms.

As the public focuses more on social issues, it's natural that some clients will be looking for examples of how your firm is being socially responsible. A closer look at what some firms are doing uncovers a variety of ways that firms can work more closely with clients, enhance recruitment and diversity efforts, and make a direct impact in the community.

Davis Wright Tremaine LLP has deep roots in giving back. To further expand and reflect the sophistication of its efforts, the firm recently hired Joanna Plichta Boisen as its first Chief Pro Bono and Social Impact Officer. She says the firm supports a diverse range of important causes.

“Giving back always has been a core value at the firm,” says Boisen. “The firm has had a pro bono program almost since its founding. We are proud that we can be the voice for the unheard, the champion for the unseen and the access point to the justice system for the most vulnerable and marginalized.” Her four-person department works across practice groups and departments to create entrepreneurial pro bono and community initiatives that involve clients and diverse communities.

At Hanson Bridgett LLP, corporate social responsibility efforts are organized through various internal firm committees, including its Pro Bono, Diversity and Inclusion Network; Women's Impact Network; and Real Action Calling for Equity (RACE) Task Force. “Each has its own budgets to manage community activities,” says Rachel A. Patterson, Director of Office Operations.

“[Hanson Bridgett LLP] matches 100% of personal contributions from staff members and nonpartner attorneys to qualified organizations up to \$1,000 per individual. This year, we also will be matching donations to Black Lives Matter charitable organizations, and when warranted, we will match donations made to natural disasters.”

The firm’s Charitable/Community Service Task Force monitors its charitable giving and approved volunteer opportunities. Staff members also participate in community efforts. “The firm matches 100% of personal contributions from staff members and nonpartner attorneys to qualified organizations up to \$1,000 per individual,” says Patterson. “This year, we also will be matching donations to Black Lives Matter charitable organizations, and when warranted, we will match donations made to natural disasters (e.g., California wildfires).”

REAL-TIME RESPONSES

The pandemic and social unrest of 2020 made us all give pause and reflect. It also prompted a range of responses designed to support employees and the community.

Novack and Macey LLP endorsed and facilitated remote work for virtually all partners and employees. But that was just the start — the firm made efforts to help the community, too.

“We recently initiated a diversity and inclusion committee to provide a forum for addressing those issues at the firm and in our community engagements,” says Stephen Siegel, Co-Chair of the pro bono practice. “And with so many people newly out of work or underemployed, we naturally identified hunger as one of the greatest needs and responded by making our largest-ever donation to the Greater Chicago Food Depository.”

Patterson says that Hanson Bridgett developed a COVID-19 Resource Center — an online toolkit designed to help clients confront and address legal issues arising from the pandemic. The toolkit, supported by a multidisciplinary team, includes daily client alerts to help clients navigate the rapidly evolving situation. Supporting staff employees also was a key priority.

Boisen says Davis Wright Tremaine also created a dedicated portal where attorneys and staff could identify pro bono and social impact opportunities where they could partner with various organizations to support communities impacted by the pandemic.

Following the killing of George Floyd, Hanson Bridgett created the RACE Task Force to address Black Lives Matter issues and firm initiatives in their immediate communities. “We held a virtual town hall that allowed everyone to share — in a very real and personal way — how discrimination has impacted their lives,” says Patterson.

The Minneapolis office of Fredrikson & Byron P.A. quickly mobilized one day after some protests turned to riots, with staff members making a direct impact in the hardest hit neighborhoods. “We created a rapid response legal program to assist small, minority-owned businesses that were damaged or destroyed,” Pamela J. Wandzel, Director of Pro Bono & Community Service, who leads initiatives with support from a pro bono service coordinator and the firm’s foundation. “This was an all-hands effort. Attorneys, staff, clients and families joined together to support the community. One lawyer organized a food and supply drive and recruited clients to provide food. Lawyers, staff and their families also attended and helped.”

CHOOSING CAUSES AND ENCOURAGING COMMUNITY ENGAGEMENT

While current events have sparked recent initiatives, most firms have underlying, core objectives that guide their social responsibility programs.

Although Fredrikson & Byron does not have a formal corporate social responsibility program, Wandzel says, “there is an understanding that pro bono provides opportunities for diverse lawyers to give back, but also — and importantly — work on social and racial justice issues that make stronger and more diverse communities.”

To encourage and materially support social responsibility efforts, Novack and Macey pro bono hours are considered equal to paying-client billable hours in determining compensation, says Siegel. “Likewise, as with other client engagements, every pro bono effort is supervised by a partner. Also, our pro bono commitment is supported by the marketing team and support staff to stay on track.”

Hanson Bridgett focuses on the “world around us,” according to Patterson. “The firm has a deep commitment to the environment, and sustainability is ingrained in every aspect of our business and shared with many of our clients. Our goal is to support our community’s safety net programs: diversity, education, economic and social advancement, environment, health and social services.”

Turning to local nonprofits that specialize in specific causes might be a good place to start. Wandzel says it’s also important to understand the role these can play in identifying new opportunities. “Listen to them, learn how they work with law firms and find out what they need. The job is difficult. You need to be flexible, have the ability to talk *with* people versus *at* people.”

BE PROACTIVE

Barrie K. Handy, Davis Wright Tremaine’s Social Impact Senior Manager, suggests creating a social responsibility plan in concert with and in direct support of the firm’s overall strategic plan. “Identify team members who are passionate about the work, can operate in a very fast-paced environment, possess an entrepreneurial spirit, and can effectively project manage. And execute, execute, execute!”

If your legal organization is looking to get serious about its social impact in 2021, the Legal Sustainability and Social Impact (Legal SASI) movement is a good place to start. This free resource launched in September in response to growing interest in social responsibility by the legal profession. The founders of the Legal SASI observed a growing need for formalized social responsibility strategies in law firms, as these are measures clients will be looking for from their legal representation.

“More clients are requiring firms to articulate their social impact commitment as part of the [request for proposal] and vetting process,” says Catherine Alman MacDonagh, JD, a Co-Founder of Legal SASI. “Being in a LEEDS building [or] having recycling bins or a pro bono program is not going to be enough.”

“In collaborating with clients to do the right thing, the legal ecosystem is in a unique position — and exerts tremendous influence — in addressing societal challenges. After all, businesses cannot survive in societies that fail.”



MacDonagh says a diverse group of lawyers, administrators, marketers and consultants launched this movement to share information, resources and best practices on interconnected issues, including corporate social responsibility (CSR), environmental and social governance (ESG), as well as racial justice and health and educational disparities.

To make connections and share information, Legal SASI has a LinkedIn page and a benchmarking survey that will help shape programs, resources and communications platforms.

Legal SASI Co-founder Pamela Cone, the author of *Creating Social Impact: How Your Firm Gains by Adopting a Socially Responsible Business Strategy*, adds: “In collaborating with clients to do the right thing, the legal ecosystem is in a unique position — and exerts tremendous influence — in addressing societal challenges. After all, businesses cannot survive in societies that fail.”

WIN-WIN

In addition to connecting with and contributing to the betterment of a community, a formal social responsibility program impacts how the public, clients and potential recruits perceive the firm. A focused program can elevate the firm’s reputation and brand within and outside the firm — setting it apart from the pack, underscoring a more personal approach and results-oriented connection with the public, and strengthening relationships that build morale and team building.

Since social responsibility efforts often intersect with other firm areas — notably diversity and recruitment — it pays to join forces with them in developing programs. Boisen’s team worked with her firm’s diversity and inclusion department to create a new Pre-Law Diversity Fellowship Program to help

expand the talent pipeline. It also developed a program during Asian Pacific American Heritage Month that explored anti-Asian racism and the challenges faced by the Asian community during the pandemic.

Recruitment is another area that can help in leveraging a sophisticated social responsibility program. Committing to social responsibility can attract new lawyers and staffers, as well as help retain talent. In particular, Millennial lawyers increasingly seek out firms that are committed to diversity and inclusion, with strongly expressed social values and with broad opportunities to contribute to and make impact in their communities.

Clients may offer a good model and strong case for instituting a formal social responsibility program. The business world has been much quicker to understand the value of embracing social responsibility initiatives since consumers often favor companies that look beyond profits. While a major investment,

taking an active role in the community and collaborating with clients on social justice and civic engagement efforts can be a beneficial proposition in terms of building firm morale and client relations, leveraging community goodwill and providing extra value.

“We do work that changes lives for the better, improves the legal system, creates good precedent and balances the scales of justice,” says Boisen.

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“We’ve had situations where there’s been a request to abate or hold off on some of the fees, or a success fee if something good happens in the case. Sometimes the risky ones turn out to be beneficial, so we’re OK taking on a little risk here and there.”

The Gentle Pushback

How can firms satisfy continued client cost requests — and still stay solvent?

When in-house teams pulled back on outside legal spending during the Great Recession, the competition among law firms for the work that remained intensified. The legal services industry became a buyer’s market — and that mindset, for some, long outlasted the economic downturn.

“The immediate aftermath of the recession was in-house counsel suddenly started to demand discounts — and they got them because law firms didn’t know what else to do,” says Tim Corcoran, Principal at Corcoran Consulting. “Without a huge change in the value that was delivered, they simply wanted to spend less for what they were buying.”

Today, the pressure to provide services at a lower cost remains a reality for a number of law firms. Up to a fifth of the fees at firms with more than 250 lawyers come from discounted hourly rates, according to Altman Weil’s 2020 Law Firms in Transition survey. At firms with fewer than 250 attorneys, 31% to 40% of the fees, on average, involve discounted rates.

In some instances, firms may be able to offset fee reductions by trimming internal expenses. But that’s not always a viable option. More than half of the attorneys who participated in a 2019 survey said managing rate discounts is one of the biggest challenges associated with pricing.

When firms find they can’t meet a fee request and provide quality legal services, informing the client can be a challenging prospect. The following approaches can help law firms effectively convey cost parameters, ensure operations remain profitable — and carefully preserve the client relationship.

MAKE COST A JOINT CONVERSATION

Pricing disconnects can arise if clients underestimate the amount of time matters will require.

Trying to align expectations may help them become more comfortable with the proposed cost, Corcoran says. For instance, if a client feels work will take much less time than the firm anticipates, the firm may want to point out the time estimate is based on its prior experience. They can offer to work with the client to determine a fee for the first stage of the engagement. That may lead to subsequent stages being priced more realistically once everyone has seen what the work involves.

“[A firm could say], if it goes further, let’s negotiate those terms at that time, not discuss it now,” he says. “It becomes a business discussion for many clients, not just a price, take it or leave it.”

Corcoran says a collaborative approach to matter pricing can also provide an additional bonus — a chance to emphasize the firm’s expertise.

“Saying, ‘To give you a proposal for what it would cost, we’ve got to dig into the issue’ — that exercise is a great way to demonstrate [the firm knows] what [it’s] talking about,” he says. “We know what questions to ask, can compare it to other matters we’ve done — we’ll come up with budget to help you manage your CFO.”

ASK FOR ALTERNATIVE COMPENSATION

Salisian Lee LLP of Los Angeles has found a flat-fee structure doesn’t often work well for its litigation work due to the time it can involve. So the seven-attorney firm instead opts for a fair amount of hybrid structures, says Co-Managing Partner Neal Salisian — potentially combining a reduced hourly rate and contingency.

“That way, we know should we prevail, there’s going to be a small contingency benefit at the end of the arrangement, so everyone’s kind of sharing in the risk,” Salisian says. “Clients are very receptive to the concept because they can get your hourly rate for [less]; the other benefit is they don’t have to give up so much upside. If you’re talking about a multimillion-dollar damage claim, sometimes they don’t want to give up 40% of that.”

Clients have also approached the firm with completely different fee structure ideas, Salisian says. Leadership will run the numbers to decide whether the arrangement would work, factoring in elements such as what the spend for particular associates to work on the case would be and any potential recoveries.

“If a client has a creative way it wants to structure a deal, we’ll consider it,” he says. “We’ve had situations where

“If someone complains about the fee, they usually don’t understand what’s behind the fee.”

there’s been a request to abate or hold off on some of the fees, or a success fee if something good happens in the case. Sometimes the risky ones turn out to be beneficial, so we’re OK taking on a little risk here and there.”

The firm has had a fairly open approach to pricing since being founded a decade ago, according to Salisian. “For the most part, we’ve increased our flexibility in terms of what we take as a contingency fee,” he says. “It’s not a pure dollar amount; maybe there’s a piece of property someone is trying to get or prevent someone from getting, and you can structure a contingency based on the relative value of whatever was not lost or is acquired.”

ADJUST PAYMENT PROCESS TERMS

If reducing fees isn’t an option, clients may find some billing flexibility helpful.

In addition to accepting payments through systems like PayPal and Zelle, Florida immigration law firm Rambana & Ricci, P.L.L.C., offers various remuneration methods and incentives, according to Partner Elizabeth Ricci.

“I take payments over time, give discounts for payments in full and credit the consultation fee to keep clients and stay profitable,” Ricci says. “People appreciate that. I try to be as reasonable as possible, but I still have to pay my staff and have my own expenses.”



“I take payments over time, give discounts for payments in full and credit the consultation fee to keep clients and stay profitable. People appreciate that. I try to be as reasonable as possible, but I still have to pay my staff and have my own expenses.”

Because the airline industry has had a challenging year due to reduced flight demand, Dinsmore, a national law firm with more than 650 attorneys, has emphasized its desire to help ease payment pressures companies in the sector might be feeling, according to Josh Lorentz, a Partner and Chair of the firm’s Intellectual Property Department and Finance Committee.

“We think in terms of decades,” Lorentz says. “Some clients in that industry asked if we could change the payment terms from 30 days to 60 or more. Some have asked for a temporary discount on invoices for three months. Those are things we’re willing to do, knowing it’s all going end and that industry is going to get back to normal.”

CONTINUOUSLY COMMUNICATE WORTH

Earlier this year, Rambana & Ricci increased its fee for matters relating to Deferred Action for Childhood Arrivals (DACA) renewal by approximately \$250. This was due to the additional security features the firm needed to invest in after U.S. Citizenship and Immigration Services began accepting signed documents digitally and the time required to address related filing changed.

Because DACA had been in the news and her clients were aware of the recent developments, Ricci was confident they’d understand why the firm had to charge more. However, people complained that because there was an economic downturn, she should have lowered prices, Ricci says.

“One client [asked] why were we charging so much,” she says. “I said, ‘I have to be on top of all the technology and legal changes that are literally happening day by day, and my time is valuable.’ If someone complains about the fee, they usually don’t understand what’s behind the fee.”

Highlighting the steps legal work involves — and any specific benefits clients receive — may help quell cost concerns.

Lorentz says some firms are underscoring services that clients were once billed for but they may now receive for no charge, such as legal research, which various organizations felt should be included in the firm’s overall legal fee after the Great Recession.



“With every new client, you have an opportunity for a retention agreement,” he says. “A lot of times, [firms may] put it up front — this includes these value-added services — so it’s known from the beginning.”

With the rise of the pricing professional role in the industry in recent years — whose job, Corcoran notes, is to provide financial insight on matters — and an increased emphasis on project management and process improvement, some firms now have data identifying the specific elements that are or could eventually be affecting matter time and cost.

That information can enable them to proactively explain and, if need be, defend their pricing structure on an ongoing basis.

“There are different tactical things firms can do to convey value,” Corcoran says. For example, he says there are a number of firms that emphasize, “‘We’re not just great lawyers but also great businessmen, and the benefit of working with us is we help you manage matters effectively, not just give you a legal outcome.’”

He notes some firms have realized using tools to provide feedback to clients in real time can be helpful. E-billing programs, for instance, can show they have the right people performing the right tasks — partners supervising and associates doing the work — and invoice content can also serve as a value touchpoint.

“There’s more understanding that invoice has the opportunity to convey value or irreparably harm the communication of value,” Corcoran says. “Some firms have spent a lot of time saying, ‘Here are the words we use in our time entries.’ It’s not just ‘Had lunch with colleagues, matter X.’ It’s ‘Met with colleague to talk about matter X and ensure we can overcome the most recent memo from the adversary and develop the recommendation for the client.’”

AN ENDURING INTEREST

While the Great Recession occurred more than a decade ago, it’s clear legal service costs remain a focus for numerous organizations.

Nearly three-quarters of in-house counsel have at least some concern their company is overspending on outside counsel, with more than a quarter reportedly very or extremely concerned, according to a 2020 LegalBillReview.com survey. More than half (55%) of the respondents indicated reducing outside counsel spend was one of their top initiatives.

“[During] the Recession, the people [lawyers] work for said, ‘Lower cost, improve value and throughput, improve quality and do it for less, or we’ll find someone who will,’” Corcoran says. “Those businesspeople will never take their foot off the accelerator.”

With uncertainty surrounding the COVID-19 pandemic’s ultimate effect on the economy, that sentiment isn’t likely to change. Firms don’t, however, need to automatically respond to all matter fee requests by slashing what they charge.

After more than a decade of negotiating revised pricing, law firms may be better positioned to understand and address clients’ cost needs. That might be through a fee reduction combined with another incentive, using the first portion of a matter to gauge the time involved or another mutually beneficial means.

“During the Recession, we saw companies looking to price certain areas of work with different firms to see where they could get the best cost — more so than we’re seeing now,” Lorentz says. “A number of industries believe this pandemic is temporary; they’re willing to stick with service providers who partner with them. It takes a lot of leaning in to foster those relationships. Being willing to run with clients who are running and walk when they’re walking goes a long way.”

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BILL & PHIL

*William Ramsey, Partner,
Neal & Harwell*

*Phil Hampton, Consulting President,
LogicForce*

“
This new smartphone
is a handful of exquisite
features that do not
disappoint.”

Samsung Galaxy Note20 Ultra 5G: Perfect for Our Tech Ego

Call us phone snobs if you will, but when the tech journalists declare a new entry on the luxury smartphone landscape, we cannot wait to get our hands on it. That certainly was the case for Samsung’s premier smartphone, the Galaxy Note20 Ultra 5G. This new smartphone is a handful of exquisite features that do not disappoint.

The Galaxy Note20 Ultra 5G is probably not for everybody. With a starting retail price of \$1,300, the Note20 is one of the most expensive phones on the market right now, and there are plenty of smarter economic choices for most users. But if you are like us — consumed with tech envy when you see a colleague using a device with more bells and whistles than yours — well, read on.

We have always contended that size does matter when it comes to smartphones. Samsung stretched the new Note20 to a 6.9-inch screen, the largest screen size we have ever used on a smartphone. Maybe it’s our aging eyes or just our supersized ego, but we absolutely love the extra screen real estate on our primary collaboration tech device. In addition, the Note20 is capable of a fast 120Hz screen refresh rate when displaying video-intensive content. By comparison, the iPhone 11 in all its variants has a locked screen refresh rate of 60Hz. What does that mean? When viewing certain content like movies, animations or games on the Note20, the experience should be much more visually pleasing.

Of course, the S Pen, or stylus, that comes with the Note20 is a big reason we became fans of the Samsung Galaxy Note line of phones years ago. With the Note20, the latency of the S Pen is the lowest ever at 9 milliseconds, which is equivalent to the latency of the Apple Pen on the iPad Pro. The result is a very realistic experience when using the S Pen to jot down notes on the Note20. We use this feature even more now

that we have both a larger screen and a faster response stylus. And even with our poor handwriting, we can easily convert our handwritten notes to text in an editable Microsoft Word document or PDF. We also really love to use the S Pen to mark up and highlight PDFs and to sign documents while we are on the go.

The Note20 sports a triple-lens camera system that is pretty common on most new, higher-end smartphones today. We can shoot photos with the standard view lens, the super-wide-angle lens or the telephoto lens. We are not photography experts by any stretch of the imagination, but we are pretty impressed with the photos we can capture. You can also shoot in robust 8K video on the Note. (But to be honest, most videos that we shoot would be fine in 4, 3, 2 or even 1K, if it exists.)

Samsung has covered the Note20 in Corning's new version of Gorilla Glass, called Victus. What does this mean? It means an increased resistance to drops, now up to 2 meters, and a more scratch-resistant screen. We inadvertently tested the drop resistance a couple of days after unboxing when the behemoth phone slipped out of hand and dropped to the floor. Gorilla Glass Victus held up like a champ and the phone sustained no scratches or cracks.

Like the Note10 model, the Note20 has a fingerprint reader on the screen for authentication. While not perfect, the fingerprint reader on the Note20 does seem to be more precise than the previous model.

The Note20 Ultra also has the 5G designation. This is the first smartphone we have bought that is 5G compatible. The Note20 communicates over the 5th-generation cellular network standard known as 5G, which is said to be orders of magnitude faster than current 4G speeds. We have been touting 5G as a coming revolution for a couple of years and now it is here — sort of. As the cellular carriers rush to build out their 5G networks, the availability and quality of 5G reception varies widely. When 5G is fully implemented throughout the United States, it reportedly will offer transmission speeds that dwarfs today's cellular networks. Our experience so far has been underwhelming.

So as we await the realization of the promises from the 5G revolution, we are very pleased with the design and function of our new pricey and flashy smartphone. Depending on where you are with your current cellular contract, many carriers are offering incentives to help with the purchase of the Note20, which is what we took advantage of. Would we have bought the Galaxy Note20 Ultra 5G even without any pricing incentives from our carrier? Probably. Our tech ego is just too big to let this big, beautiful smartphone sit on the shelf.

ABOUT THE AUTHORS

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

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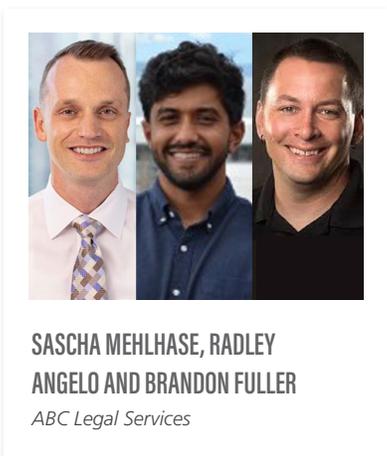
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SASCHA MEHLHASE, RADLEY ANGELO AND BRANDON FULLER
ABC Legal Services

Increasing Access to Justice with Technology

There is a growing awareness around the current limitations of the courts, particularly around the lack of equal access to the legal process for all who fall within a given court’s jurisdiction.

Access to justice involves providing everyone in a community with the ability to have adequate and comprehensive representation in the legal process. It touches on the ability to be “present” during proceedings, to have enough information to make informed decisions, and to be able to be represented in court. Technology is one hope for closing some gaps in the legal system and increasing accessibility.

The current impact of technology on court access and its potential ability to increase access further was explored by a group of four panelists in a recent webinar from ABC Legal Services, “A New Day in Court: Technology and the Legal System.” Panelists from ABC Legal Services included Sascha Mehlhase, Vice President of Product; Brandon Fuller, Chief Technology Officer; and Radley Angelo, Head of Customer Success. The discussion provided a mix of ideas around technology and how it can improve access to justice from the perspectives of the courtroom, the law office and the public. The following are key takeaways from their conversation.

WHAT ARE CURRENT TRENDS IN LEGAL TECHNOLOGY AND ACCESS TO JUSTICE?

A core principle of access to justice is physical access to the court system and a trial. While technology was making some headway in that regard through telephonic hearings, Brandon Fuller notes the pandemic accelerated the acceptance of technology — necessity overwhelmed historic reluctance. He points to the adoption of videoconferencing for certain court services during times of social distancing as a prime example of technology opening new doors for clients as well as lawyers. His team at Docketly, which provides appearance counsel services, has seen this shift firsthand.

“Finding impactful ways to incorporate technology in the legal process will be key to not only providing access but also making the process feel accessible and comfortable for legal clients.”

“We saw people that previously couldn’t get to a particular court hearing because it was far away from where they were being able to use these systems to join. [Lawyers] could go and get on a Zoom conference, and not have to get on a plane, to fly up to practice somewhere in their own state.”

Fuller warns that courts will need to be cautious about adopting existing public solutions, which may provide a quick fix for now but were developed without court privacy and processes in mind. He hopes that this technology can be explored further by courts that will customize solutions to truly fit their needs and better serve the legal process.

HOW CAN TECHNOLOGY SHAPE INFORMATIONAL ACCESS TO COURTS?

Sascha Mehlhase spoke about the implications of the digitization of courts, of the concept of the court coming to be more of a service than a place. Of particular note for Mehlhase is the “consumerization” of the courts in China. The “smart court” system in China has allowed the average citizen to make informed choices around their case by placing known information into a system that provides a predicted result should the case be pursued in the court. He additionally credits this technology with supporting court infrastructure in China through the pandemic. The courts were well-equipped to deal with fully remote legal processes with e-filing and videoconferencing solutions largely already in place.

Technology adoption in the U.S. court system has not yet reached this level of sophistication, though Mehlhase says that the focus on clients and data has made its way into certain parts of the legal services sector. In such companies, technology and automation tools — like artificial intelligence (AI) and document management systems — connect data between courts and legal clients to provide a secure, transparent transaction. The panelists discussed transparency and security at length during the webinar, underscoring the need for balance to create accessibility without compromising client trust.

HOW DOES TECHNOLOGY SHAPE LEGAL CLIENT EXPECTATIONS?

Mehlhase suggests that the normalization of technology and the ability to have the world at one’s fingertips via the internet have created certain expectations. People anticipate easy access to products, services and information — instant access, even. To cater to these expectations and maintain their client lists, legal professionals need to stay on top of the technology their customers are using. He argues that people appreciate and judge law professionals based on their successful adoption

and implementation of technology, especially when they can see it for themselves. Finding impactful ways to incorporate technology in the legal process will be key to not only providing access but also making the process feel accessible and comfortable for legal clients.

Mehlhase notes that adopting technology is mutually beneficial for both legal professionals and their clients. Providing data and communication allows for a level of transparency that satisfies a client’s need for information while providing rich feedback for an attorney. Using technology to manage, track and analyze data gathered throughout the legal process, attorneys and paralegals may be able to glean insights into better strategies for their business. Data can provide gateways to optimize pricing and timelines and engage more customers at the right point in time to get and retain their business.

HOW CAN LEGAL PROFESSIONALS USE TECHNOLOGY TO UNDERSTAND CLIENT INTERACTIONS?

Radley Angelo suggested that technology is allowing law firms to have increased oversight and insight into their customers, and he spoke at length regarding the potential application of customer relationship management (CRM) tools. He emphasized the need to view customer relationships as alive. “They’re not one-and-done; it’s not a ticket that you open and close,” he says. “It’s a relationship, and that really matters.”



Technology like CRM enables a law firm to organize and manage data around customer interactions. It ensures that even the smallest voices are heard and that outreach doesn't fall into a black hole masquerading as a team inbox.

CRMs provide opportunities to improve existing interaction and communication with clients, and they could help firms connect with clients down the road, according to Angelo. One of the strengths of CRMs is their ability to serve not only as an organization tool but as a full database centered around client data. Angelo encourages law firms to explore this option so they can not only discover who their customers are today but also how they can grow their ability to reach and provide services to a broader audience.



Continue the Conversation

Delve more into how technology can close the access to justice gap. You can access the full webinar, "A New Day in Court: Technology and the Legal System," by **signing up** at abclegal.com.

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Sascha Mehlhase is the Vice President of Products and Innovation at ABC Legal Services. He oversees ABC Legal's growing product, marketing and customer experience teams. With nearly 20 years of product and marketing experience in software and technology, Mehlhase has advanced product strategies and led global teams in a variety of industries. He earned an MBA from Loyola University, Chicago, and a BA in Social Economics from Hamburg University, Germany.

Radley Angelo is Head of Customer Success at ABC Legal Services. He has experience leading rapid prototype development and software engineering consultations with companies of all sizes. Prior to becoming Head of Customer Success at ABC Legal Services, Angelo worked as Chief Executive Officer of Spark Creative Tech, as a Software Engineer Intern at National Geographic, and as a Research Associate at Qualcomm Institute at the University of California, San Diego.

Brandon Fuller is Chief Technology Officer at ABC Legal Services and President of Docketly. He has a long career of innovating technical solutions in digital platforms with a focus on cloud-based software. Prior to becoming CTO at ABC Legal Services, Fuller worked as the Chief Executive Officer of Docketly, Technical Leader for Blue Jeans Network, Technical Leader at Cisco Systems, Owner of Orion Software Development, and Director of Product Development at Latitude Communications.

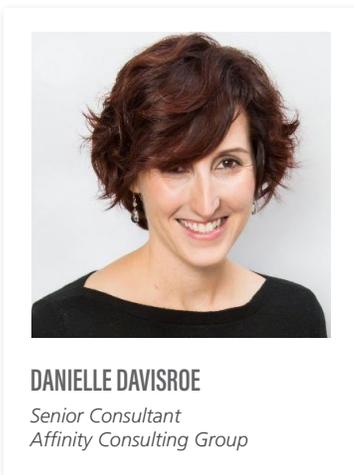



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Alternative Ways of Learning: Empower Your People To Excel by Offering Training That Meets Their Needs

All too often, training programs only meet the needs of some trainees — specifically, those who learn like the person putting together the program. Trainees who learn best in other ways are left in the dust; you may even hear them complaining about how training wastes their time.

“The most effective training is in the context of how the learners will apply the information in their jobs.”

Implementing an effective training program not only meets the needs of everyone in your organization, but it also excites your people and makes them eager to learn more.

People learn in different ways: some need visuals, others prefer listening. Some prefer to read and write, and others need hands-on training. The VARK model divides learners into four categories:



Visual



Auditory



Reading/writing



Kinesthetic

While most people learn best by one of these methods, everyone can learn with the other techniques — the training just isn't as effective for them. Beyond the VARK model, learners can also be separated into social and solitary learners. Chances are your organization employs all types and configurations of learners.

TRAINING FOR EVERYONE

Developing a training program that has something for everyone can be challenging when there are so many types of learners working together. The most effective training considers the preferences of all learners and offers something for everyone. While a more traditional approach focuses on the trainers' perception of the best way to provide information, more effective methods acknowledge the role that learners play in their own training and how their experiences and learning styles shape the outcome.

Context

The most effective training is in the context of how the learners will apply the information in their jobs. This allows learners to draw connections between their experiences and the training. Examples should be closely aligned with the work your learners do every day. Better yet, pull examples directly from learners' recently completed work.

Pacing and Depth

Perfect pacesetting is impossible when training a large group of people. Different learners need to know different things and want to move through the material at different rates. Whenever possible, break people into smaller groups based on their objectives for the training and their learning styles.

Attorneys, paralegals and legal assistants frequently need training at very different levels. They typically have disparate duties and expectations entering training. When the training involves an advanced technical skill usually performed by a legal assistant, an attorney's goal may be to understand what is possible rather than to master the skill. On the other hand, the legal assistant responsible for doing the work needs to perfect the technique. In this example, trying to train the attorneys and legal assistants together will result in frustration for everyone.

Materials

Training programs that provide a variety of content are best suited to reach learners of all types. Social learners do best in a group setting — whether that is in a physical classroom such as your conference room, a virtual classroom such as an interactive webinar, or on an e-learning platform with social features. Solitary learners do best with one-on-one training, self-guided e-learning and the option to ask questions one-on-one after training classes.



TRAINING CLASSES

Training classes, whether they are taught in your conference room or via webinar, must include content for all types of learners. Visual learners need visual aids, either PowerPoint presentations with graphic elements or demonstrations. Auditory learners need to hear the material — don't just show but tell. Describe what is being taught. Reading/writing learners need time to take notes during the class; they need a slower pace than visual and auditory learners. Kinesthetic learners need to follow along with exercises whenever possible. Like reading/writing learners, they also need a slower pace.

When providing technical training, demonstrating the technique is critical for almost all learners. Visual learners want to see you do it; auditory learners want to hear you describe the steps as you do it; reading/writing learners want to take notes as you do it; kinesthetic learners want to do it themselves as you do it. Provide exercises in the context of the learners' job. Are you teaching how to build a table of contents in Word? Use a legal document like ones your learners frequently prepare.

OUTSIDE THE CLASSROOM

Training doesn't just happen in class. It occurs after class with takeaway materials, on the job as learners put the teachings into practice and on-demand as new tasks create an interest for learning new things. Providing content to enable learners to succeed after class and on-demand rounds out any training program.

In-depth, full-featured manuals are invaluable reference guides when they're organized well and easy to navigate. Include screenshots, images and graphs for visual learners. Written step-by-step instructions guide reading/writing and kinesthetic learners. Beyond technical instructions, include the big-picture context and reasoning behind the teachings. Manuals are easiest to use when provided as text-searchable documents with clickable tables of contents.

Many learners do best with easy-to-follow reference guides. Easy reference guides contain the bare minimum steps to accomplish a task and annotated screenshots every step along the way. They don't have to worry about getting lost in the process when they can visually confirm that they are in the right place.

Training videos provide on-demand and solitary training. Short, task-specific videos are perfect for helping learners when they get stuck in the moment. The most effective just-in-time training is 2-10 minutes long. More complicated tasks might take longer, but most can be taught in a short video. Use a video player that allows learners to select the playback speed to give them control over the pace so they can speed it up or slow it down to meet their needs.

Longer training videos provide more in-depth information when learning something new. More detailed than quick task-based training, these allow new hires or learners who missed class to catch up to their peers. Don't forget to provide any hands-on exercises used during class to those watching the video.

YOUR BEST BET

Your best bet for putting this all together is a comprehensive learning management system, commonly referred to as an LMS. The best LMS will include integration with webinars, allowing learners to register for and attend training webinars directly from the system.

Hands-on exercises, manuals and easy reference guides can be accessed directly from the LMS. Legal management professionals can easily assign courses to learners as needed and upload a variety of forms of content. Social features, such as discussion boards, enable learners to interact with one another and trainers, meeting the needs of social learners. Furthermore, learners can easily locate and watch training videos on-demand.

ABOUT THE AUTHOR

Danielle DavisRoe is a Senior Consultant at Affinity Consulting Group and the Lead Technology Trainer for Affinity Insight. Whether it's teaching clients a new skill, writing a macro to automate a complicated task, fixing a document that doesn't work properly or automating a complex set of documents, DavisRoe's focus is entirely on improving the work and lives of her clients.

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COME LEARN WITH ALA

ALA's e-learning courses are self-paced so learners to consume information at a pace that suits them. Check out our catalog of courses at lms.alanet.org/e-learning.



ALA Congratulates Its 2021–2022 Board of Directors & Chapter Resource Team

ALA is pleased to announce the 2021–2022 Board of Directors and Chapter Resource Team. These individuals will officially take office on May 6 and will usher in the Association into its 50th year.

The ALA Board of Directors is responsible for establishing the vision, mission and goals of the Association as well as setting its strategic direction.

Members of the Chapter Resource Team (CRT) assist in the development of creative strategies that promote and educate members on the policies, programs and initiatives of ALA, including providing support and resources to chapters and their leaders. In addition to serving as mentors to chapters, team members serve as subject matter experts and they are interested in the further development of their own leadership skills.

The members that make up these groups are held in the highest regard and have been entrusted to guide ALA and the legal management profession into the future. Please join us in congratulating this extraordinary group of legal management professionals!

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Anniversaries, Awards and Appointments

Members on the Move »



Kathleen A. Abebe, a member of the Capital Chapter, is now Office Administrator at Jones Day in Washington, D.C.



Cindy L. Bennett, a member of the Orange County Chapter, is now Office Administrator at Holstrom Block and Parke, APLC, in Corona, California.



Scott M. Griffiths, a member of the Boston Chapter, is now Firm Administrator at Nystrom Beckman & Paris, LLP, in Boston, Massachusetts.



Jo Osika, a member of the Greater Los Angeles Chapter, is now Chief Financial Officer at Eisner Jaffe, PC, in Beverly Hills, California.



Mark A. Stropkaj, a member of the Pittsburgh Chapter, is now Executive Director at Hopping Green & Sams in Tallahassee, Florida.



Member Named to Committee on Alternative Business Structures

Kate Bryant, CLM, member of the Arizona Chapter, was appointed by the Arizona Supreme Court to serve on the Committee on Alternative Business Structures. In August, Arizona announced some industry shakeups, one of which opens the door for nonlawyer investment in law firms and profit-sharing within firms with nonlawyers as incentives to bring in top talent, but firms were barred from that due to anti-fee-sharing rules. The new rules took effect on January 1. Katie's term runs through December 31, 2021. Congrats, Katie!



Listen to Learn

ALA's *Legal Management Talk* podcast features exclusive interviews with industry thought leaders, conference speakers and Association members who are doing great things.

RECENT EPISODES INCLUDE:



- Law Firm Life After COVID-19** with Monique Mahler
- Redefining the Markers of Success** with Monica Wofford, CSP
- Previewing ALA's Virtual Master Class** with Kathy Gruver, PhD
- Authentic Diversity: Changing the Workplace for Good** with Michelle Silverthorn



⌚ Each episode is **free** and usually **fewer than 15 minutes long!**

alanet.org/podcast

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.

Save the Date: Virtual Town Hall

The Executive Committee hosts regular town hall sessions to share news and offer a forum for members and business partners to ask questions of the Association's leaders. The next virtual town hall will be January 14 at 11 am. Central.

Register at bit.ly/39eZVC8 to receive a Zoom invitation and to submit any questions you have about ALA activities in 2021.



ALA Welcomes MyCase to VIP Program

ALA is proud to announce the newest member of our Value in Partnership (VIP)SM program (alanet.org/vip). MyCase has joined the program to help your law firm thrive in the next year. The way attorneys conduct business has drastically changed since the pandemic first swept across the country. Virtual client experiences and remote staff collaboration are absolute necessities in the coming year.

MyCase is an all-in-one law practice management software that includes everything your firm needs to manage these changes with ease. Don't miss out on powerful case management with added features like:

The MyCase logo, consisting of a stylized human figure icon and the word "mycase" in lowercase blue letters, is positioned on the left. A dashed blue line extends from the logo to a vertical list of five features, each represented by a blue circular icon with a white symbol. The features listed are:

- Internal chat (icon: two people with speech bubbles)
- E-signature and countersignature (icon: document with signature and MyCase logo)
- Two-way text messaging (icon: two people with speech bubbles)
- Online payments (icon: dollar sign and person)
- Virtual intake forms (icon: document with checkmark)

ALA members get a 10% lifetime discount! Start a free trial today and get all you need to run your law firm in 2021.



Share Your Story!

ALA is celebrating its 50th Anniversary as an Association next year, and we're asking members to help us celebrate by submitting their story to be featured in next year's 50 Years, 50 Stories video campaign. Each week we'll be highlighting a member's story on our website and social media.

Filming your story is super easy. Follow the instructions on app.videopeel.com/kg80v4k2 to easily record and upload your video. No professional acting experience required! The video will take less than 60 seconds to create and you're free to respond to a prompt or tell your own story. If you have any questions, don't hesitate to reach out to ALAI50@alanet.org.

Sign Up for Human Resources Courses

Delve deep into law firm human resources management in the classroom-style format of ALA's web-based courses. Each course is comprised of six interactive weekly sessions that will teach you new skills and tools while delivering CE credits. These live sessions are led by instructors who are experienced both in teaching and practicing the subjects they discuss. They are recorded for on-demand access at students' convenience.

The first HR course, Employee Selection and Promotion, commences January 14 (registration closes January 8). You can also register for HR 2: Performance Management and Compensation (commencing in May) or for both courses using the HR package — ideal if you intend to earn the Legal Management HR Specialist Certificate. Learn more at alanet.org/web-based-courses.

Looking for a less long-term commitment? ALA's e-learning courses use a self-directed module format, which means you can complete as much as you want in one sitting and return to the course when you have time. The current offerings are based on Law Firm Management Essentials, including an HR course. Learn more at alanet.org/elearning.



ALA Today Bundles: Education for This Moment

The recently released ALA Today bundles offer the education that law firm leaders need to address the challenges that arose in 2020. And they do so with packages that are accessible and affordable. Each ALA Today bundle — one for each of the five knowledge areas of legal management — includes three educational components. They're derived from webinars, e-learning courses, *Legal Management* CE courses and session recordings from ALA Today: The Virtual Conference.

Learn more and purchase bundles at alanet.org/ala-today-bundles.