

LEGAL MANAGEMENT

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Maximizing Your Knowledge Management Reserves

From enterprise-wide support roles to constantly updated archives, find out how firms are tackling proprietary information oversight.





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ALA Is Ready to Get 2022 Started



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Happy New Year, ALA! If you are anything like me, then you are probably still getting through the crazy of the end of the year at your firms and closing the books on 2021. You may also be working on new strategic plans and business at your firms, too. I hope that you all have been having a great holiday season and were able to take some time to be with family and friends to celebrate another trip around the sun.

We've been up to some exciting things. For example, have you checked out the new platform for ALA's Online Community? It's a great way to connect with members with easier chat functions and cleaner posting and organization. I've enjoyed the social media-style format. If you haven't seen it yet, be sure to check it out.

ALA has continued working hard through the end of the year and making progress on many of our strategic direction initiatives. We've also made some updates to the coming year regarding our in-person events including the new vaccination requirement. To enable in-person events to take place with lower risk to participants, effective January 1, ALA is requiring proof of COVID-19 vaccination for admittance to all ALA in-person meetings and events. You will be required to show either proof of COVID-19 vaccination or a negative COVID-19 test taken within 48 hours of arrival on-site. It's going to be a busy and exciting year, and we look forward to having you all with us for the events we have coming up.

“
ALA has continued working hard through the end of the year and making progress on many of our strategic direction initiatives.”



Another one of ALA's initiatives is to increase the visibility of the Certified Legal Manager (CLM)[®] program and to highlight its importance. Is this the year you decide to take the test? We've got an article in this issue where members share how earning the credential has benefited them and their careers — it might be the inspiration you need to register for the exam this year! We'll be auditing the program to identify any gaps and ensure that it satisfies current needs. Be sure to check it out.

Finally, if you haven't had the chance to check out the awards program and the new requirements for the Elevate ALA Award, we invite you to do so. It's a great way to highlight what you, your chapter or your fellow members have been doing. The call for submissions is still open until January 21.

Hope everyone is off to a great start for 2022! More to come from ALA soon.

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Mental Health FIRST AID
from NATIONAL COUNCIL FOR MENTAL WELLBEING

MENTAL HEALTH FIRST AID CERTIFICATION PROGRAM

Time is running out to get your certification in Mental Health First Aid! Just 30 participants are permitted in each in-person virtual session due to the highly interactive nature of the learning experience. Register for one of the following dates:

- **Friday, January 28, 10 a.m.–4:30 p.m. Central** **COURSE FULL**
- **Friday, February 4, 10 a.m.–4:30 p.m. Central**
- **Friday, February 18, 10 a.m.–4:30 p.m. Central**
- **Friday, March 4, 10 a.m.–4:30 p.m. Central**

Create a supportive environment at your workplace. Learn how to recognize the signs and symptoms of a mental health issue, how to listen and reassure, and how to refer someone to appropriate professional support.

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Source: National Institute of Mental Health

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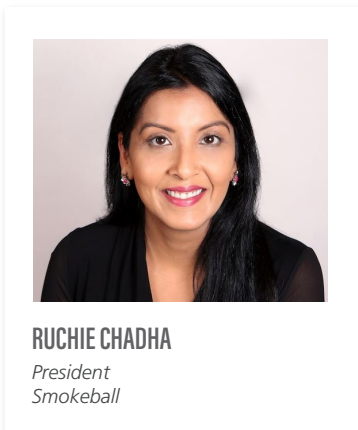


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RUCHIE CHADHA
President
Smokeball

How Staff at Small Law Firms Can Balance Legal Work and Mental Health

The past two years have been a time of great change — and great uncertainty — at small law firms.

This environment inspired attorneys, legal administrators, paralegals and other staff to stick close to their firms. In 2021, median attorney turnover was 6.7%, down from 16.7% in 2020; meanwhile, staff turnover dropped from 25% in 2020 to 13.3% this year.

But low turnover doesn't necessarily show a firm is creating a healthy, supportive environment for its attorneys and staff. In May 2021, 37% of lawyers reported feeling depressed, up from 31% in 2019, and 71% experienced anxiety, up from 64% in 2019. Like everyone in our communities, legal professionals aren't immune from the effects of isolation, burnout and an uncertain future.

Fortunately, this is one place where smaller firms have an advantage over the giants. When partners at the top create an environment where everyone's voice is welcome, legal administrators, associates, paralegals and other team members have an opportunity to create a firm where mental health is prioritized and valued.

“Remember that your mental health affects your ability to support your firm's clients, who likely are retaining your services at one of the most important points in their lives.”



REMOTE WORK ≠ IN-PERSON

After going nearly entirely remote in March 2020, lawyers are returning to the office at a higher rate than many other professionals — as of August 2021, occupancy rates for law firms were back up to 56%, compared with 34% of companies nationwide. But only 28% of firms predict in-office work will return to prepandemic levels. Thanks to technology and employees' desire for greater flexibility, in-office work isn't a must-have for many firms.

But remote work isn't just a duplication of in-office work and must be treated differently. Flexible work hours that accommodate a lack of child care or other personal needs can be a great start. But "always-on" expectations for staff are a sure path to burnout. Half of respondents to Bloomberg Law's Attorney Workload and Hours Survey said they experienced burnout in Q1 of 2021.

Technology that allows staff to share and shift tasks, clearly communicate, and see the entire firm's work in one place is also critical for remote work. While it won't perfectly replicate the in-person experience, technology can ensure that files are never lost, clients feel appropriately supported and staff are able to take the breaks they deserve.

USE PTO TO BOOST YOUR MENTAL HEALTH

While around 40% of law firm employees have unlimited paid time off (PTO), only 31% use all their vacation days. And COVID-19 has only made matters worse: Nearly all Americans (92%) canceled, postponed or entirely skipped booking a vacation in 2020 due to the pandemic. In fact, they worked an additional hour per day on average. Legal professionals reported taking just three days of PTO in Q1 of 2021.

Even if you're not comfortable with the idea of a big beach vacation, it's still important for legal professionals to use PTO for its intended purpose. Remember that your mental health affects your ability to support your firm's clients, who likely are retaining your services at one of the most important points in their lives. By using your PTO and allowing for others at your firm to cover your work, you also give them permission to do the same.

CREATE MENTAL HEALTH AMBASSADORS

Employees who are passionate about technology or culture often form committees or act as internal champions. The same tactics can be used to promote your firm's mental health. These people help create and promote a safe space



for conversation about mental health, fielding and implementing suggestions that work for the needs of all employees. Ideas can include no-call/email/text hours or "summer Fridays" that extend all year.

These mental health ambassadors also can work with your IT department or leadership team to find helpful technologies. For example, adding automated tools that improve your billing practices can free up hours for employees to spend recharging or completing fulfilling tasks instead of manually billing their time.

Most importantly, remember that your mental health is paramount to your professional satisfaction and success as at a small firm. If you or someone you know is considering suicide, please reach out to someone you trust or call the National Suicide Prevention Lifeline (800-273-8255) at any time.

ABOUT THE AUTHOR

Ruchie Chadha is President of Smokeball, a company that offers legal practice management software to lawyers. In her role, she oversees the product, marketing, sales and client teams. Before joining Smokeball, Chadha was a family law attorney in the Chicago area. She now focuses her career on delivering innovative solutions to lawyers so they can better serve their clients and build healthier businesses.

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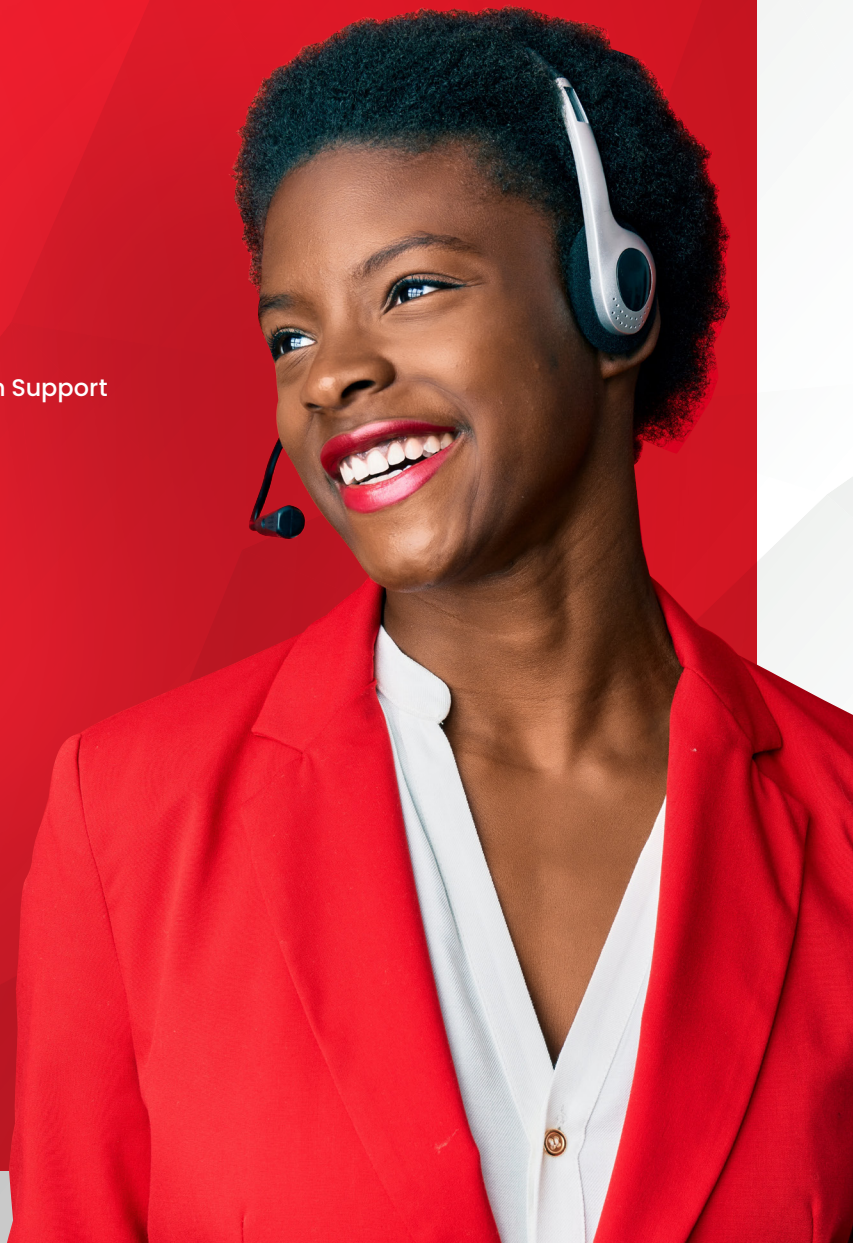
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SHIRLEY LABOY

*Director of Administration
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The Power of Mentorship in the Workplace

How important are mentorship programs in the workplace? These programs are not only critical but also good for business.

As we become accustomed to our neoteric work setting, we remain keenly aware of the makeup of most law firms and legal departments in the United States. A 2019 American Bar Association report notes 63% of active lawyers are men and 37% are women. The statistics for racial diversity are as grim — only 4.7% are Black, 4.8% Hispanic and 2.5% Asian. None of these race and ethnicity statistics have changed over the past decade, even though the overall populations in the United States have increased over that same timeframe.

One way to improve those numbers is mentorship. Many of our organizations have pondered, reviewed and voiced our opinions and plans to initiate or improve our mentoring programs. But what's next? The path to moving forward may lie in shifting our thinking to believe our mentorship programs will not only create a culture and environment of camaraderie, but also empower members of those groups who may have been overlooked in the past or — more importantly — felt powerless to move their career to the next level. (Not to mention that empowerment can also have a positive impact on the organization's bottom line.)

So here are a couple of questions: Where is the power behind mentorship programs? And does it reside with the mentee or the mentor? When we look at the cycle of mentorship as never-ending, the simple answer is in both.

“The long-term goal is to transition the mentee, over time, into the mentor role. If that new mentor is from an underrepresented group, they are now empowered to expand on diversity efforts in their organization.”

CHOOSING WISELY

A 2020 *Forbes* article advises mentees to be deliberate in their mentor choices: “Seek out the mentors that you need that will lead you to greatness in your field.” The article suggests a minimum of three mentors to speak with on a regular basis. That can be a tall order, as some of us have difficulty finding one person who will offer nonjudgmental advice.

Many new graduates will find this exercise daunting and perceive asking for help as a weakness. Imposter syndrome can be a long-term detriment to an individual’s well-being and the practice of law. However, seasoned individuals know the power in asking for assistance will generate new ideas and perspectives on how to solve problems in ways they might not have thought of yourself.

Securing the courage to ask for assistance is a great baseline. If the mindset has changed and the courage is there, the mentee should simply pick up the phone to call several individuals they admire who can provide the professional guidance and ideas for further professional development. Under the tutelage of a mentor, the mentee will gain confidence and knowledge and become empowered to reach their career goals. Mentors can also identify and correct gaps in skills that allow the mentee to pivot, if necessary. Meanwhile, the mentee can imagine the next three to five years of professional growth and propel those goals forward with the mentors’ guidance.

REWARDING ENDEAVOR

Having the influence of a mentor along a career path can be life-changing. In a study conducted at Oracle over a five-year period, 1,000 mentored employees were observed. Of the individuals who participated in the study, 25% achieved a pay raise (compared to 5% of employees who were not mentored) and 72% were retained (compared to only 49% of those who weren’t part of the program), suggesting that mentored employees offered more value to the company in their longevity.

Therefore, the responsibility of taking on a mentor role should not be taken lightly. The mentor is expected to provide honest, constructive and nonjudgmental feedback. Their ability to remain positive and enthusiastic in the professional relationship will allow the mentee to focus on improving their skillset and broadening their network. (Advancement requires commitment to your work as well as connections to those who can and will refer you to the next stage in your career.) A good mentor understands when to lead and when to stand in the shadows, motivating and energizing the mentee.



This may sound like a motivational speech — but that’s the point! The mentor role is invaluable to an organization. With the dismal statistics at the beginning of this column and the summary of the study at Oracle, there’s plenty of evidence of the opportunities that exist to grow the mentorship’s influence in the legal community.

The long-term goal is to transition the mentee, over time, into the mentor role. If that new mentor is from an underrepresented group, they are now empowered to expand on diversity efforts in their organization.

Even with this information, legal workplaces continue to struggle with mentoring programs. Research points inadequate training as the reason so many fall short. Individuals will encounter a scenario where sensitive conversations are necessary or unconscious bias can limit their willingness to engage with someone. Training as a condition of taking on a mentor role can minimize negative experiences and have a positive impact.

As the Oracle study shows, mentoring programs are successful in advancing and retaining talent. If law firms and legal departments address mentoring with the power of intention, we can harness the benefits that come with that effort

ABOUT THE AUTHORS

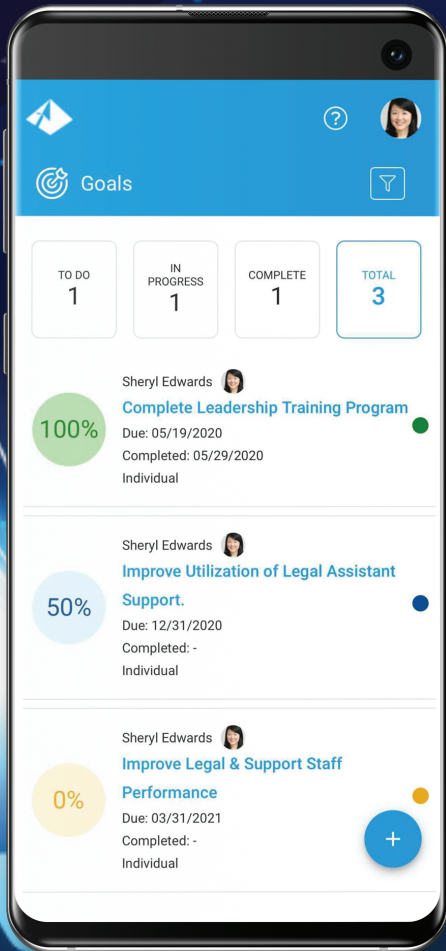
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DREW AMOROSO
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Why Am I Avoiding This? (And What to Do About It)

These tips can help you work through your procrastination problem.

You’ve done it again. It’s the night before an important project is due — a deadline you’ve known about for weeks now. You’ve had multiple opportunities to work on this, but for some reason you’ve waited until the last minute — again! — to get started.

Not only are you feeling the stress of having to complete this project, you’re also engaged in a pretty healthy dose of negative self-talk: *Why am I not more disciplined? I don’t know how to manage my time. I’m not organized. My colleagues would not have waited until the last minute to do this.*

We’ve all put ourselves in this position before — but why do we do it? Is it because we have an innate character flaw or because we need to be more disciplined? Or is there something else behind this that causes us to constantly avoid certain projects or tasks in our workday?

And, most importantly, what can we do about it?

THE SCIENCE: WHAT’S REALLY BEHIND THE AVOIDANCE?

Let’s start with the science. At its core, procrastination is not about an inability to manage our time, a character flaw or our lack of discipline. It’s about emotion management.

We engage in procrastination when we are unable to manage negative moods we experience in connection with a task. We use procrastination to cope with things like anxiety, insecurity, self-doubt and a range of other emotions that we experience in connection with the workday situations we encounter.

“We use procrastination to cope with things like anxiety, insecurity, self-doubt and a range of other emotions that we experience in connection with the workday situations we encounter.”

“Procrastination also provides you with a very powerful reward — the feeling of ease and calm that comes with not having to confront your emotions.”

“There is always an emotion behind our actions or, in the case of procrastination, our inaction,” says Kendra Brodin, MSW, JD, the Founder and Chief Executive Officer (CEO) of EsquireWell, an executive coaching and consulting firm focused on the legal industry. “We may be afraid of making mistakes or not completing a task to a certain standard. We may be nervous about having a hard conversation because we know it might be emotionally challenging for us or someone else.”

At the heart of procrastination is what scientists call “present bias.” In a 2013 study, Timothy Pynchyl, PhD, and Fuschia Sirois, PhD, found that present bias can be understood as “the primacy of short-term mood repair ... over the longer-term pursuit of intended actions.” In other words, procrastination is about being more focused on “the immediate urgency of managing negative moods” than taking on the task, says Sirois.

Here’s an example: Imagine you’ve been tasked with writing an important proposal. Your boss has indicated that a lot is riding on this project. Sitting at your desk, you begin to think: *Do I know how to do this? What if I let my boss down? I’ve never written a proposal like this before. What will the repercussions be if I’m not able to deliver?*

At the moment you start to experience these emotions, procrastinating offers you a release valve. It provides you with a way to access the relief of not having to deal with the emotions that stem from the project or a future outcome you are anticipating — things like self-doubt, low self-esteem, anxiety or insecurity.

By procrastinating, you avoid the sting of not feeling smart enough, wondering whether you’re actually going to do it right, or reliving the reaction your boss had the last time you did not meet her expectations.

Procrastination also provides you with a very powerful reward — the feeling of ease and calm that comes with not having to confront your emotions.

Even if you know it’s not in your best interest to delay getting started, your desire to avoid these kinds of emotions trumps any negative consequences that you know might result from kicking the can down the road. The potency of the reward, in the present moment, is just too powerful.

In short, procrastination is not about an innate character flaw, a lack of discipline or an inability to manage your time. Our tendency to engage in avoidance is, rather, deeply rooted in our emotions.

STRATEGIES: WHAT CAN WE DO TO CHANGE OUR BEHAVIORS?

If our inability to manage our emotions is at the heart of our avoidance, then learning how to manage our emotions in a new way is the key to overcoming our tendency to procrastinate.

Psychiatrist and neuroscientist Judson Brewer, MD, PhD, Director of Research and Innovation at Brown University’s Mindfulness Center, says that in order to rewire ourselves, we have to give our brains what he calls the BBO — the Bigger Better Offer.

Specifically, we have to provide our brains with a reward that is bigger and better than the reward we get from engaging in avoidance (i.e., “I don’t have to deal with this now!”). The reward must also be one that isn’t detrimental to a future situation in the way that procrastination can be.

Here are three concepts you might consider if you’re looking to work on your tendency to procrastinate.



CONCEPT #1: PRACTICE SELF-COMPASSION AND LETTING GO

Self-compassion involves learning how to treat ourselves with kindness and understanding despite our perceived shortcomings. Practicing self-compassion and letting go helps get to the heart of the emotional change you want to experience.

Let's go back to our original example. Imagine you've just received a new project — something you've never worked on before. Your boss is really counting on you to get it right.

If you feel yourself procrastinating ("All I want to do is run away!"), engage in this four-step process:

1. Acknowledge the emotion. Slow down and take some deep breaths. Acknowledge that you are in a moment where you've identified yourself procrastinating. Do not beat up on yourself ("Here I go again!"). Instead, keep it light ("Nice try — I caught you doing it again but it's OK.").

"My clients have the best luck beating procrastination when they take a hard, honest look at why they are procrastinating in the first place and acknowledging that emotion," says Brodin. "Trying to ignore a task doesn't make it go away — it just causes angst and anxiety while it is delayed."

2. Practice letting go of that emotion gently. Give yourself some grace for trying to procrastinate. Remind yourself that you understand why your mind wants to procrastinate — it's just trying to protect you.

3. Identify a positive outcome that will come from engaging in the task. Try to reframe the way you're thinking about this situation. Also remember that just because the negative emotion is the one that's most present doesn't mean it's the only one behind this experience.

We can have a whole range of emotions associated with a particular task that can actually be helpful for us — for example, excitement around taking on something new, the feeling of proving to yourself you can do it, or the satisfaction you'll feel when you receive praise for a job well done.

4. Envision a future positive outcome. Specifically envision completing the task on time, receiving positive feedback, or a scenario in which the project not only turns out OK but better *than you think*.

CONCEPT #2: MAKE THE THINGS THAT ASSIST IN YOUR PROCRASTINATION HARDER TO ACCESS

Another approach is to change your environment or day-to-day circumstances. In other words, make the things that assist you in procrastinating harder to access.

This includes things like deleting distracting apps from your phone, creating a distraction-free work environment by turning off email notifications or other media, or keeping food and drink out of your immediate reach.

By adding a layer or several layers between you and your distractions, you make the reward that comes from procrastination harder to experience and therefore less tempting.

CONCEPT #3: USE RESOURCES THAT ALLOW YOU TO BETTER IDENTIFY AND PROCESS YOUR EMOTIONS

Practices like meditation, therapy or other tools that help us get in touch with and identify our emotions — and process them in a healthy way — also help us change our experience, including the emotional pull that's the root cause of our procrastination.

Take advantage of wellness programs, mindfulness practices or other resources offered by your employer or that you can access on your own time. While they might not be styled as a resource that helps you procrastinate less, each of these options is a healthy contributor to tackling the issue.

One final note: Because procrastination is deeply rooted in our emotions, addressing and dealing with procrastination can stir up powerful feelings. If you do decide that you want to take a deep dive into these emotions, consider engaging the help of a qualified professional who can assist you in navigating these issues.

ABOUT THE AUTHOR

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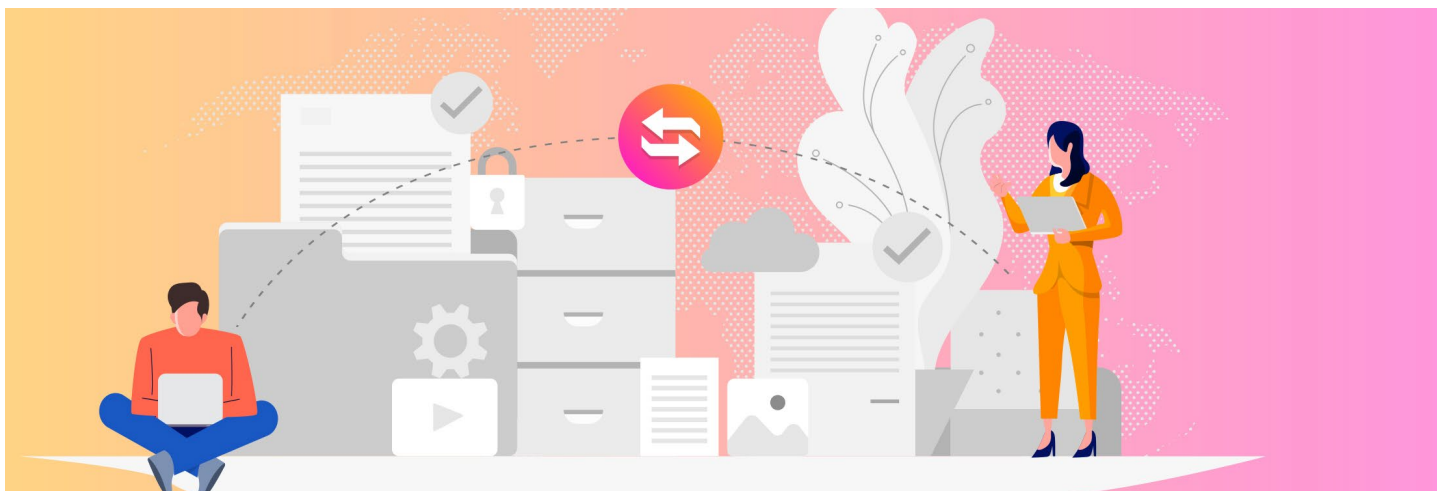


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“Knowledge collateral — such as curated collections of materials on particular topics like climate change mitigation, which could include external regulation items, client presentations and other types of content — are stored electronically so firm members can easily access all relevant elements.”

Maximizing Your Knowledge Management Reserves

From enterprise-wide support roles to constantly updated archives, find out how firms are tackling proprietary information oversight.

In recent years, some law firms’ internal knowledge management efforts have been increasingly influenced by external factors. Driven by a desire for more efficient legal service delivery — and an understanding of what firms are doing to achieve it — knowledge management practices have become top of mind for more clients.

It’s not uncommon, for instance, for Freshfields Bruckhaus Deringer’s knowledge offerings to come up in pitches, according to Ruth Musgrave, Global Head of Knowledge for the firm’s global transactions practice.

“It’s something that’s often been part of the discussion with clients,” Musgrave says. “Sometimes they ask what can they expect in terms of education opportunities — what briefings will they get? Can they sign up for seminars?” She notes they also ask what the firm does to train staff. “They want to know the lawyers that will be working on their transactions will be fantastically trained and up to date.”

In today’s tight job and client services markets, a law firm’s knowledge resources can be a key way to distinguish it from its competitors.

As a result, numerous firms are making knowledge-related investments. In the third quarter of 2021, expenses related to knowledge management and library service increased by an average of 5.3% compared to the same time period in 2020, according to the Thomson Reuters Peer Monitor Index. Knowledge management spending also rose during the second quarter of 2021.

ASSIGNING IN-HOUSE KNOWLEDGE DUTIES

Knowledge management can encompass various subjects and types of content, including guidance on how to handle a specific type of matter as well as information about staff members, white papers and other thought leadership materials.

Some firms have appointed dedicated individuals or groups to oversee and augment their internal knowledge resources — potentially a law librarian, for example, or someone in a brand-new knowledge-oriented position.

ALA’s Annual Compensation and Benefits Survey revealed the industry had added a number of new knowledge management-related roles in 2019, bearing titles such as knowledge/experience management technology administrator and knowledge management technology analyst, with responsibilities that involve supporting knowledge management processes and leading efforts to capture and maintain experience information.

Freshfields’ team of knowledge lawyers perform a number of information-related tasks within the global 2,800-plus-lawyer firm. The work can include providing updates on legal market developments; briefings, blogs and other information used in client outreach efforts; and internal training.

Knowledge collateral — such as curated collections of materials on particular topics like climate change mitigation, which could include external regulation items, client presentations and other types of content — are stored electronically so firm members can easily access all relevant elements.

Having a knowledge team that can pull information together on a large scale is important for firms with locations in multiple countries, according to Caroline Doherty de Novoa, Global Head of Knowledge for Freshfields’ dispute resolution practice.

“There has been an evolution of the knowledge function, and it’s very much not a back-office, just-managing-resources function and hasn’t been for a long time,” she says. “We want to make sure if we’re looking at a risk topic, we’re looking at the whole 360-degree view of that risk.”

Along with lawyers who’ve practiced for years, the firm’s knowledge function also includes professionals who are dedicated to research and help with content management

“A number of firms have obtained or produced technological tools and procedures to help facilitate the knowledge management process.”

“to make sure the wheels are all turning and the taxonomy works,” Doherty de Novoa says.

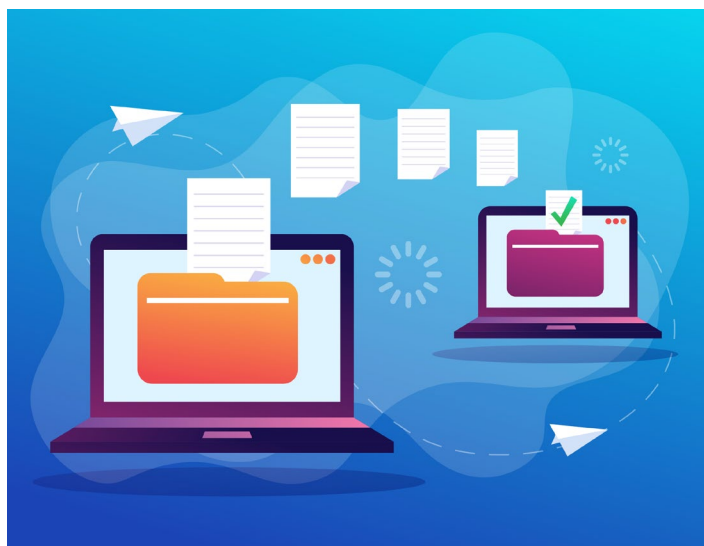
“There needs to be a fair amount of governance, as well, to make sure things are organized in a way people can find them — [and] it continues to work,” she says. “Because any database or content repository just can get out of hand if you don’t have that.”

STOCKPILING AND SHARING DATA

A number of firms have obtained or produced technological tools and procedures to help facilitate the knowledge management process.

Knowledge management-centric tech may offer impressive returns, according to Aderant’s 2020 Business of Law and Legal Technology survey. In fact, 62% of law firm respondents said it had a moderate or major impact on efficiency at their firm.

Jon F. Doyle is Founder and Managing Shareholder of International Law Solutions, a boutique law firm that focuses on global workforce matters. He encourages attorneys he works with to use Find Global Counsel, an online search platform he created based on relationships he’s formed with firms in more than 100 countries, when they need to locate attorneys.



“Even if a firm decides a knowledge management solution would be a worthwhile asset to add, for it to be as effective as possible, employees need to understand how to use the technology.”

Although Doyle says many of the lawyers in his Miami-based firm have built ample international contact lists during their years in the field, instead of reaching out to potential attorneys or firms in other regions individually, the digital tool allows them to just send one request to a wide audience. Then they'll receive multiple proposals for assistance with a project, including attorneys' fee information. Site users can view the proposals and project status updates on a dedicated page, helping to centralize the information in one place for future reference.

The firm is also currently creating a more robust version of the Office 365 folder-based database firm members refer to for information about the tax and regulatory elements involved in offering stock options and other equity to workers in more than 50 countries.

The new searchable database — which will be organized by criteria such as country and type of project — will provide the firm's attorneys with the most up-to-date information. It will also be available to clients, who can use it to find out what high-level rules apply to employee stock options in various countries, Doyle says.

Because some of the basic information clients used to pay for is now more readily available for free, he feels offering a general overview of what clients would need to do can inspire them to reach out to the firm to take the next steps — and allow its attorneys to focus on more nuanced and potentially lucrative work.

“We look at giving information out to people as a real benefit because, at some point, information is a commodity,” Doyle says. “It's also a great marketing tool because people don't know what they don't know. They're then more likely to call us and say, ‘We'd like to pursue this in China. Can you help us?’”

Freshfields also recently launched a client-facing knowledge management resource — a data breach notification tool derived from information it has amassed helping clients respond to cyber incidents across multiple jurisdictions. “It's important internal efficiency tool, but it also benefits clients,” Doherty de Novoa says.

“It allows people to insert key information on the breach and get a heat map showing them which jurisdictions there are

notification requirements in and what the timelines are. That helps them to triage and understand where they need to focus their efforts.”

Some firms — typically larger ones, according to Alay Yajnik, Founding Partner of the Law Firm Success Group consulting service — have implemented databases that serve as a record of firm members' proficiencies.

Such solutions can help firms fully leverage all internal expertise to serve clients, whether that involves cross-selling or identifying the most appropriate person to work on a matter.

“At small firms, it tends to be very informal,” Yajnik says. “That can start to become an issue when firms hit maybe 20 to 30 attorneys and they're growing; attorneys may not know each other well or their capabilities well.”

Firms may be able to house and provide information — such as which team members have handled corporate mergers and acquisitions of a certain size, for example — fairly simply with solutions they already have in place, he says.

“Firms can use SharePoint; if they have [Microsoft] Office, they have it,” Yajnik says. “And they can use a company intranet and make sure skills are listed there. It doesn't have to be super complicated.”

Doyle's firm also employs a few low-tech practices to manage and convey knowledge internally, ranging from holding a simple conference call to update firm members about legal developments in another country to labeling correspondence so it can be easily searched.

“Outlook is a great way to find things you've worked on,” he says. “We identify every email by client, country, area. You can quickly look in Outlook [to see] if anybody has done anything in Bangladesh lately, and when Bangladesh pops up, [remember], ‘Oh yeah, we did a project for such-and-such client.’”

MAKING KNOWLEDGE MANAGEMENT WORK

While a tech-oriented approach can potentially help law firms organize some of their knowledge management resources, the technology's adoption may face some challenges.

“There’s a lot of opportunity in this field to improve productivity and quality through better knowledge management,” Yajnik says. “But to their credit, law firms are being pragmatic about it. Being on the leading edge means investing a ton of time and money in these tools.”

Even if a firm decides a knowledge management solution would be a worthwhile asset to add, for it to be as effective as possible, employees need to understand how to use the technology.

Yet possible search limitations — such as not knowing the best keyword to enter to generate results for a certain type of expertise — can limit some knowledge tools’ ultimate value, according to Yajnik.

Busy work schedules are also often an issue. However, making the time to establish and utilize law firm knowledge resources can be worthwhile, Yajnik says.

“For example, a partner would train an associate, but the person has something to refer back to when the partner isn’t there,” he says. “They can say, ‘Oh yeah, we talked about this, and here are the detailed things we need to do.’ It reduces the need for associates to go back to a partner and ask questions; they’re written down and captured. Knowledge management would actually back up the teaching.”




SHARE YOUR EXPERTISE

This article mentions having employees sharing their expertise at their firms as a way of finding people who have experience in certain areas. Did you know you can do that with ALA, too?

Let ALA headquarters know by signing up with our Peer Consulting Network. When logged in at alanet.org, click on *My Account* and select *Account Details* from the drop-down menu. In the blue navigation bar, click on the *Share My Expertise* tab. Select “Yes” for the statement “I am interested in volunteer opportunities within ALA.” Then indicate whether you’d like to be included in the Peer Consulting Directory.

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

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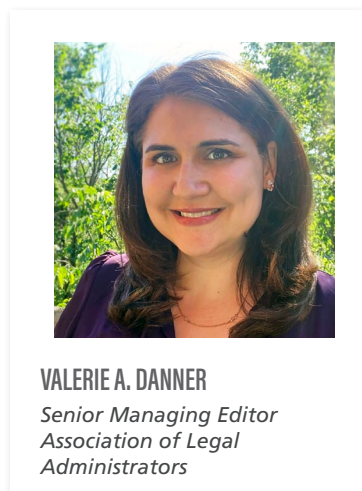
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VALERIE A. DANNER
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“ I understand the concern about the time commitment, but honestly for me it wasn’t nearly as bad as I had expected it to be. Sometimes our own fear of committing to a new endeavor is what holds us back the most. It makes it easy to put off something we need to do.”

Certify Your Career

Earning your CLM designation can give you the edge over your competition.

It’s a great time to be on the hunt for a new job. Pandemic-induced early retirements and record numbers of people quitting have given job seekers the upper hand and their choice of jobs. If you’re looking to change legal organizations, now is the time to make your résumé to stand out from the email pile.

One way to do that is with your Certified Legal Manager (CLM)[®] after your name. It’s how Dawn Donham, CLM, sets herself apart. As the Administrator at Worden Thane, PC, in Missoula, Montana, Donham faces a unique set of challenges. With a population of just over a million, Montana’s law firms are generally much smaller than those in more populous states. This often translates into less legal support staff to go around, leaving lawyers on the hook for running the business aspects of the firm in addition to serving the client’s needs.

“Often the firms are so small that an administrator isn’t even staffed,” says Donham. “Solo practitioners will often hire a legal assistant who is also charged with the firm’s operational or billing duties. A boutique firm may have a receptionist or bookkeeper but will divide up other managerial tasks among other owner-attorneys. This means that attorneys are responsible for running a business and practicing law. In some cases, one attorney may naturally gravitate toward doing all the administrative duties, leaving less time for them to serve clients. This can put added stress on the attorney, who may also be responsible for contributing to firm revenue.”

Though the firms are smaller in Montana, the challenges remain the same as any other: The lawyers need to serve clients and generate revenue. Donham saw this as an opportunity. Earning her CLM was one way to show her command of law firm administration and demonstrate that she could remove the burden of administrative tasks to help attorneys realign their practices toward improving client service.

She's not alone. Many legal managers turn to the CLM credential to boost their profile in the industry. Ken F. Koehn, CLM, CPA, CMA, is Chief Financial Officer at Gould & Ratner LLP and serves as Chair of ALA's Certification Committee. He looked to the CLM program after being away from legal for nearly 10 years.

"I thought that the exam, and especially preparing for it, would be a great way to quickly get back up to speed on the knowledge needed for my role," says Koehn. He got that and more, as he says earning his CLM amplified his voice within his firm. "I find it's been a tool that has continued to come in handy. The knowledge gained has proved to be relevant time after time, allowing me to contribute to discussions and planning much more than I otherwise would have."

Eric Hightower, CLM, SPHR, is Director of Operations at Wright Constable & Skeen, LLP; he also serves on ALA's Board of Directors. He says his CLM has been instrumental for his last two positions. "In my prior [job], they specifically advertised for a CLM," he says. When he was interviewing for his current position, he made sure the certification was part of his interview process.

"I submitted a copy of the KSAs [knowledge, skills and abilities] associated with the designation so the powers that be could have a deeper understanding of the benefits they would receive by hiring a CLM. There were some questions regarding the KSAs that were asked during the interview. I like to think this action and the designation gave me an edge with my current position!"

Though the industry has shifted tremendously in the last 50 years, there is one constant within the profession: Legal managers need to understand a lot about almost everything operations-related in a firm.

IT'S NOT EASY — THAT'S THE POINT

The high-level overview of the program is that those who pass the exam demonstrate the core knowledge identified as essential to the effective performance of a principal administrator. Earning the CLM demonstrates mastery of the knowledge, skills and abilities ALA has classified as paramount for managing a law firm.

In terms of the actual exam, it's broken down into the following areas: financial management (31%), human resources (33%), legal industry/business management (19%) and operations management (17%).

That likely sounds like a daunting list. But that's also the point — it's designed to be challenging. But don't let that deter you.

If anything, the amount of work you put forth studying for the exam will make passing it that much more meaningful.

Katie Bryant, CLM, says that while it wasn't easy, it also wasn't as time-consuming as she had feared. "I understand the concern about the time commitment, but honestly for me it wasn't nearly as bad as I had expected it to be," says the Executive Director of Udall Shumway PLC. "Sometimes our own fear of committing to a new endeavor is what holds us back the most. It makes it easy to put off something we need to do."

It's where the phrase "#JustTakeTheDamnTest" came from — she really wants others to remember those words when they are on the fence about whether to take the exam. "For me, certification demonstrates my commitment to superior professionalism, upholding industry standards and continued learning. The credential has helped boost my professional credibility and prestige within the legal community."

Plus, ALA has multiple resources available to help you prepare.

A good place to start is with the Certification Committee. Not only has each member of the committee gone through the exam process, but they also oversee revising and writing test items. Additionally, they work with the testing contractor to evaluate and improve the assessment process, while partnering with ALA headquarters to administer the program and recommend needed changes in prerequisite and certification requirements.



“Aside from the career boost, many CLMs find the process opens the door to an even tighter circle of friends within the ALA community.”

And Koehn says the committee has some exciting projects in store. “Our test question writing has been refined to incorporate the results of the latest Practice Analysis, as well as to be cognizant of avoiding implicit bias. And we are developing a Path to Certification model, which potential exam takers can use to guide their study in an organized manner.”

Other study materials include the CLM Webinar Bundle, which includes 10 on-demand recordings to help you prepare for the exam. When completed, this bundle satisfies the 10-hour education requirement for the CLM application.

You can also purchase the *Study Guide for the CLM Exam* to prep. It focuses on real-world issues legal managers face and details the CLM Content Outline of the Body of Knowledge, also known as the test blueprint. You’ll also find a practice exam and a comprehensive list of terms and definitions. ALA also offers an interactive way to study with the CLM e-learning supplement.

As an exciting new way to study, ALA headquarters began hosting CLM trivia events last year to coincide with the test dates. The questions are taken directly from the *Study Guide*. The events are open to all (but free to exam takers) and aim to bring some fun competition to prepping for the test. They’ll be offered again this spring and fall ahead of the exams.

Then there is the study tool that many find the most critical to their success: joining a study group.

STUDY GROUPS: CERTIFIED COMMUNITY

Aside from the career boost, many CLMs find the process opens the door to an even tighter circle of friends within the ALA community.

“Being part of a study group and having a study buddy (thank you Joyce Patrick-Bai, CLM!) made it so much easier and, when I think back on it, a very enjoyable process,” says Bryant.

Koehn agrees and cites being a member of the Chicago Chapter’s study group as his gateway into great ALA participation. “I met many people while studying for the exam and, once I passed, discovered a great community existed that I had not really tapped into before beginning my CLM journey.”

Victoria L. Allen, CLM, Administrator at Goren Cherof Doody & Ezrol, PA, first looked to the CLM exam to validate her wealth of industry knowledge. “While I had a lot of practical experience, I did not have a college degree, and I hoped that obtaining the CLM designation would give me more credibility than just having the experience,” she says.

She also found lifelong friendships in the cohort she studied with. “My study group was such a great experience,” says Allen. Her group offers a good outline for members looking to get their own group together.

“We formed our group based on geography and met at one person’s office on a Saturday to work out our details,” says Allen. They had a clear plan: They mapped out a study timeline based on the exam date and selected topics of study for each session, setting a lead person for each session. “We encouraged people to lead a topic they were not strong in so that it would push them to study a little harder,” she says. They also enlisted some local business partners to speak on their areas of expertise.

For the final sessions, they each wrote 10 practice questions similar in format to the samples given. “That was the hardest part,” recalls Allen. “You had to really be able to understand the topic to write a good question.”

Though she took the exam in 2004, to this day, the group remains tight. “[We] regularly get together to celebrate birthdays and other milestones and still reach out to each other for help on touchy subjects,” says Allen.

CONTINUING YOUR EDUCATION

Earning the CLM can also be away to brush up on core competencies in an ever-changing field. By now, we are all familiar with the changes that firms — well, everyone — experienced due to the pandemic. These changes present opportunities for legal administrators to have their invaluable input heard.

“For example, managing space and leases will continue to be an evolving topic for firms,” says ALA President Michael T. Bumgarner, CLM, CPA, CGMA. “Even though some firms never would imagine letting people work remotely, the legal

workforce has demonstrated it can be remote, and incoming employees are going to continue to push for more flexible schedules. Part of the CLM means understanding leases and options.

“Needing to recertify every year means CLMs are always up on best practices in any given area. It’s become even more valuable to have this type of understanding in these current times,” says Bumgarner, who is the Chief Executive Officer at Flaherty Sensabaugh Bonasso PLLC.

BRINGING MORE RECOGNITION TO THE CREDENTIAL

One area that needs work is bringing more attention to the role of legal managers and the benefits of earning the CLM to the broader legal industry.

“I’m actually very disappointed that most attorneys in regional firms do not recognize the CLM or even the ALA,” says Allen. “Since earning my CLM, I have changed jobs three times and each time while I proudly listed CLM on my résumé, I had to educate the hiring attorneys as to what it meant and had to tell one what the ALA was. I understand not every attorney is going to be aware, but if a firm is large enough to hire an administrator, they should at least be aware of the organization.”

Koehn agrees. “I would like to see the program expand in terms of publicity and recognition for the CLM credential. I would hope that more members would earn their CLM designation, and one way to achieve this is to work on making the credential as well-known and valued in the legal industry as other professional certifications, such as SHRM.”

It’s on the ALA Board of Directors’ radar, as elevating the certification is part of ALA’s latest strategic direction, says Bumgarner. “We know our members need education opportunities to stay current in this ever-evolving profession. When the ALA Board of Directors unveiled this direction earlier

last year, education and professional development was one of the key components of that direction. One of the goals within that is to enhance professional development through industry-recognized certification and credentialing. CLM is certainly a part of that.”

Deciding to earn the CLM is a commitment of time and even headspace. It’s not an easy process, and it does require commitment to maintain it each year. But that’s also what makes it so rewarding.

“While the materials are extensive and the exam is difficult, the end result is rewarding for the professional and for the law firm looking for a qualified individual to manage and lead their firm,” says Donham. “Through my experience, I have built on my professional knowledge and can confidently say that a law firm will benefit in the short term and long term if they choose to recruit a professional who holds the Certified Legal Manager credential.”



READY TO TAKE THE NEXT STEPS?

You have two opportunities each year to take the exam: spring and fall. You can learn more about the process by visiting alanet.org/clm or by emailing certification@alanet.org.

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

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WENDY J. MEYEROFF

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“To build brand loyalty, providing free ‘get to know us’ and ‘stay with us’ giveaways on a regular basis is a great tool.”

It's Good to Have Giveaways

OK, admit it: You're one of those folks who's up late at night, flipping across 300-plus TV channels. Inevitably, ads pop up for various law firms.

“Find out more about XYZ Law Firm, *the* leaders in gleaning benefits for mesothelioma. Call now — or check our website — and get our booklet, *You CAN Get Restitution for Mesothelioma!*”

You (and your firm's leaders) may think that giveaways like this booklet, or the Keep Your Estate handout in other ads, aren't really effective. Or maybe the attitude is that they're “too commercial” and thus diminish your firm's aura of respectability. But before you all dismiss the benefit of any giveaway, wouldn't it be wise to understand the many options available — and explore their effectiveness?

UNDERSTANDING LOYALTY

Study after study shows that free giveaways can generate amazing loyalty, of which there are two kinds, according to a study from ReSci. Customer loyalty is brought about when prices are lower or there are great money-saving discounts. That's usually more critical for retailers.

Brand loyalty is when customers fall in love with your particular product or service, like legal savvy. Said customers will always come back to you, even if you're a bit pricier than others in the same arena.

“FREE” BUILDS “LOYALTY”

To build brand loyalty, providing free “get to know us” and “stay with us” giveaways on a regular basis is a great tool. And it's often far more cost-effective than broadcast ads. As some marketing researchers wrote, “People perceive the value of the free products as higher.”

Many other studies confirm this. Among key stats from the Quality Logo Products Blog:

- ✓ 83% are more likely to do business with the company in the future
- ✓ 9 in 10 people can recall the name and logo on the giveaway
- ✓ 7 in 10 brands consider promotional products effective in achieving marketing goals

Yet that same article offers a disturbing insight, too. The top 10 industries using these giveaways include health care, tech and financial services — but not law firms.

FIVE EASY GIVEAWAY OPTIONS

There are lots of budget-wise marketing handouts that could help your practice gain recognition. Here are just five:

- 1. Newsletters:** These don't have to be long, in-depth items. A savvy one-pager can gain solid customers. Research showed these coordinators were keeping the hole-punched item in loose-leaf form as reference tools, thus a solid reminder.
- 2. Booklets/e-books:** Similar, but e-books are electronically developed and downloaded, while booklets are generally published in the traditional way. E-books provide an image of authority when your firm's leaders are presenting on TV, radio or podcasts — without taking the same time and dollars as a traditional book. Booklets — like the mesothelioma example — are great for other marketing, including webinar giveaways, website pulldowns and offers during commercials (to build a mailing list).
- 3. Infographics:** When you check the blog post noted for the stats mentioned earlier in this article, you'll see great infographics. This tool has erupted in popularity in recent years; it's simple, fast-reading, with insights that pique interest — even respect — for the source.
- 4. Flyers:** If you can handle infographics, you can develop flyers. Many of these are one-pagers, offering quick notes about special events coming up. Others can provide the kind of checkpoints and stats that infographics offer.
- 5. Brochures:** Every good business can use a brochure. Get the graphic done and then you can hand out real paper ones or let folks download it.



In fact, almost all these examples (except the e-book) are good in paper format. That way when leaders are speaking at a trade show, chamber of commerce or other event, they can offer these handouts.

Remember, your insights must be truly informative — not just a batch of commercials. Yes, you can offer self-promotional news periodically. I did it for one of my clients when I created his LinkedIn Pulse stories. Some were quick news items, such as when he took part in a special event or was hosting a webinar. But most were true features because the best bet to entice your audience is to educate them. You can always add in this reminder: "For more great insights — and discounts — on _____, contact XYZ Law Offices at _____."

GETTING IT DONE

Your decision-makers need to be truly honest. Who in the firm can really provide day-in, day-out marketing needs? Who understands the different levels of plain language? How is the practice going to inaugurate its marketing program?

These are just a few of the questions that need answers. But if your firm truly seeks to be noticed above the competition, they're great things to consider. Then start generating a solid giveaway program.

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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BILL & PHIL

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Neal & Harwell*

*Phil Hampton, Consulting President,
LogicForce*

“
We recognize that there are very good options that do not meet all these requirements, but these are the standards we set for our new laptop.”

Our New Laptop Winner Is ... Samsung Galaxy Book Pro 360

We have been in the market for a new laptop and have spent quite a lot of time trying to decide which one to purchase.

There are a lot of new incredible ones that have been released recently, including new models from the Microsoft Surface, Apple MacBook, Lenovo ThinkPad and Dell Latitude lines. We started our search by stipulating that whichever laptop we purchased, it needed the following qualities:

- ✓ Lightweight (preferably 3 pounds or less)
- ✓ Microsoft Windows operating system
- ✓ Intel Core i7 processor
- ✓ Long battery life
- ✓ Ability to convert from a laptop to a tablet

We recognize that there are very good options that do not meet all these requirements, but these are the standards we set for our new laptop.

Our search was aided somewhat by Intel, the company that makes many of the processor chips found in computers. Beginning in 2020, it created the Intel Evo label, which any laptop can carry — regardless of manufacturer — if it meets some minimum requirements that Intel considers important for a business-class laptop. Some of those requirements overlapped with our wish list, so we narrowed down our search to laptops that were designated as Evo-compliant.

AND THE WINNER IS ...

Phil has always been a fan of Samsung phones, but up till now we had never purchased a Samsung brand PC or laptop. But our search for a new laptop ended when we found the Samsung Galaxy Book Pro 360, which became our first Samsung computer purchase. For starters, the Galaxy Book carries the Evo label, which means it already has many of the requirements that we were looking for in a laptop. We opted for the 15-inch display over the 13-inch one.

There were a few features about the Galaxy Book Pro 360 that really stood out to us in the selection process. Samsung, of course, is known for the stunning AMOLED displays on its high-end phone models. This very rich display has been replicated on the Galaxy Book Pro laptop. The full HD 15-inch display on our laptop is bright and the colors are very rich. Also, the Galaxy Book Pro 360 is a two-in-one convertible. The screen can rotate a full 360 degrees to lay flat on the other side of the keyboard. Even in this tablet mode, the device is very thin and very comfortable to work with.

The laptop also comes with a Samsung S Pen for writing on the screen. It works quite well — we use it quite frequently to sign and annotate documents and to take notes. However, we do wish the laptop had a designated slot to store the pen when not in use. It will attach magnetically to the back of the display panel, but we tend to store it separately in our backpack so that it will not get lost accidentally.

The laptop itself is very light, tipping the scales right at 3 pounds. The 15-inch display provides enough room for a separate number keypad on the keyboard, which is one of the reasons we went with the larger display screen. The keyboard itself, while spacious enough, is just an OK keyboard in terms of tactile response. We wish the keys on the keyboard had a little more depth to them, but then again maybe we're just being a little too picky. The feel of the touchpad has also taken some getting used to. The touchpad on the keyboard

panel is huge, but (and again we're probably being overly picky) the surface is so smooth that our finger tends to move too quickly while selecting items on the screen.

While Samsung advertises a 20-hour battery life, we haven't verified that our model actually gets that performance. We are, however, able to unplug the laptop in the morning, take it with us to the office or court, and use it all day long for general office work (and a little bit of leisure) on a single charge. All-day battery life is very important to us because we hate having to scramble in the middle of the day to find an outlet to recharge our laptop.

Being that Samsung is the manufacturer, you would expect there to be tight integration between the laptop and other Samsung products. There is a Quick Share feature that allows you to share content very easily between the laptop and your Samsung phone. The Samsung Flow app also lets you share your phone screen directly to your laptop screen. There are further integrations for Samsung's Galaxy Buds and Galaxy Watch, which we have not used. The bottom line is that the Samsung Galaxy Book Pro 360 is a great laptop regardless of what other smart devices you may own, but if you own Samsung devices, the nice integration is an even stronger incentive for getting this laptop.

So we are very pleased with our recent laptop purchase. As of right now, our new Galaxy Book Pro 360 is scratching all our itches. But we are anxiously awaiting the 2022 Consumer Electronics Show in Vegas. We can't promise we won't be back in buying mode after the first of the year ...

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*.

 twitter.com/BillandPhil





ERIC SCHURKE
 Chief Executive Officer
 Money Penny Group North America

“There is a lot to be said for true listening and learning — not simply hearing what a client or team member is saying, but taking notice and acting on what they have said.”

6 Tips for Creating a Healthier and Happier Workplace

There’s been an enormous amount of pressure caused by COVID-19. As we near the end of the pandemic’s second year, the emotional toll is likely to show itself more.

We’ve always taken the well-being of our staff seriously, but even more so in the last two years, especially as they had to rapidly adapt to home working. And while some of our staff enjoyed the flexibility of working from home, others found it more difficult.

Our managers have had to ensure they kept thinking outside the box, and they maintained open and regular communication with teams through various engaging virtual activities, from online birthday celebrations and quizzes to home schooling tips and exercise classes. Now, with hybrid working patterns becoming more permanent, it’s still vitally important for professionals to protect their mental health and well-being. That means legal managers, too! Taking care of yourself allows you to be more attuned to other firm staff. You are in a position to set the tone for how your organization handles these difficult situations.

These are some other tips we have found to help:

1. TAKE A BREAK

We know from our legal clients that there are numerous stressful moments in their line of work. Remember, if you work at a Ferrari pace, then you should also have Ferrari brakes. By that I mean know when to stop and when to have some fun. We recently hosted a VIP celebrity-style red carpet event and party to create opportunities for relationship building among our people in a light-hearted atmosphere.

On a day-to-day level, I’m a huge advocate for the power of walking — a 10-minute walk outside in the fresh air can give you renewed energy to come back and face a difficult task or a tricky client or work situation.

2. RANDOM ACTS OF KINDNESS

We've found that small gestures of kindness have big impacts on employees' mental well-being. For example, we have an in-house video team that puts together specially designed videos with birthday messages for our people. We also provide yoga and meditation classes and have done nutrition classes and cooking tips. From our experience, these measures all help maintain staff happiness.

We've also observed our staff practicing random acts of kindness at an individual level, too. It becomes a pay-it-forward model: If you show kindness to a work colleague, they'll likely return the favor soon enough, and that could make your day.

3. GET INVOLVED

We've noticed that the more our people are involved in the company, the more likely they are to feel invested in its future and to be satisfied with their jobs, consequently doing a better job for their clients.

On an informal level, we share good news with our people when business is going well. We also involve them in business achievement celebrations, such as sending pizza lunches or bottles of wine to them at home or hosting quiz nights. If your firm isn't already doing these sorts of things, why not suggest them?

4. LISTEN TO YOUR COLLEAGUES

There is a lot to be said for true listening and learning — not simply hearing what a client or team member is saying, but taking notice and acting on what they have said. Being successful these days comes down to ensuring that each team member understands everyone's value and knows how to communicate with others who might have a different mindset. It applies to all stakeholders, customers, partners, people and the marketplace. It also provides clarity, encourages openness and develops trust. With more openness and trust, there is consequently a block on negative attitudes like suspicion and fear.

5. INTRODUCE NEW PRODUCTS AND SERVICES TO HELP THEM BE MORE PRODUCTIVE

With the rise in use of technology in recent years, consider any new technologies that will help your people be more

productive. This will make their role more efficient, freeing up more time for them.

For example, consider any products and services that can be outsourced, like telephone answering and live chat. Our use of LiveChat has doubled since the start of the pandemic, and we see it increases satisfaction due to its instant and expert responses. According to *Forbes*, at 83%, LiveChat boasts one of the highest customer satisfaction rates. It's also incredibly efficient. A LiveChat agent can manage up to three live chats at once, instead of being able to handle only one phone call at a time. There are also other new products and services with low entry costs that emerged during the pandemic, such as a triage chatbot. Qualifying leads and prioritizing new inquiries, chatbots have been particularly popular with legal and property companies.

6. TREAT COLLEAGUES LIKE CELEBRITIES

With all service sectors, we know that it's important to treat clients like celebrities because they are the company's lifeblood. Legal is no different. We believe that a company's staff also deserves that same red-carpet treatment.

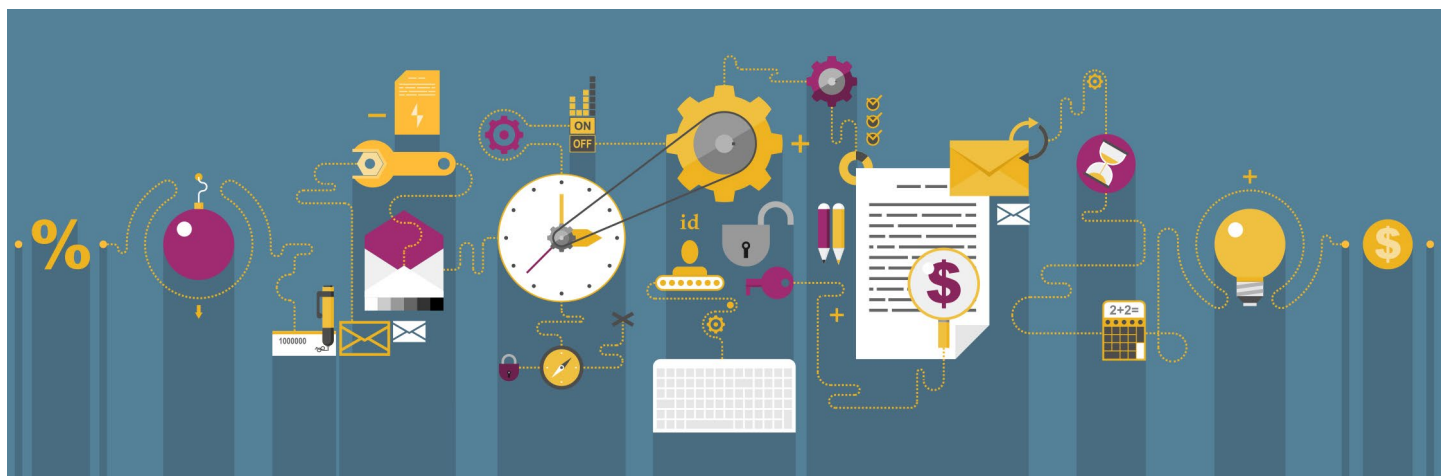
As humans, we are unique and each have something to offer. We are all important people with a desire to connect. Businesses need to recognize this.

As we preach about how we treat customers not as numbers or paychecks but as trusted partners, the same importance should be paid to our people. I encourage our teams to recognize that their colleagues are unique and that they will have different motivators and responses. If you can recognize this, then you'll be able to trust one another, allowing everyone to become the best they can be. Where you have trust and respect, happiness and well-being will surely follow!

ABOUT THE AUTHOR

Eric Schurke is the Chief Executive Officer of MoneyPenny Group North America, the world's leading provider of telephone answering, outsourced switchboard, live chat and customer contact solutions, handling over 20 million calls and live chats for 21,000 businesses, many of them franchises.

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



DAN TACONE
*President and Chief Client Officer
 Intapp*

How Emerging Technology Is Evolving the Legal Administrative Assistant Function

Through the years, the role of the legal administrative assistant (LAA) has experienced radical changes. For decades, firms have faced pressure to have non-lawyer staff do more with less and have turned to technology to help keep pace with large volumes of work.

In the past 40 years, the introduction of technology such as the modern calculator, PCs, the internet and mobile devices has represented inflection points in the role of LAAs. These advances have helped these employees show their value beyond the secretarial role of days past and created opportunities to take on more strategic roles within the firm.

Today, a new wave of technological innovation within firms is creating another inflection point for LAAs. The rapid adoption of automation technology — such as artificial intelligence (AI) and machine learning — has made it possible for repetitive tasks to be efficiently handled through increasingly sophisticated software. As a result, LAAs are becoming even more tech-savvy and have been presented with another chance to focus on higher-value work that impacts the overall client experience.

SHIFTING TO PROJECT MANAGEMENT

Although many lawyers still maintain their own dedicated LAA, progressive firms are changing that paradigm to provide one for every five to seven lawyers. Interestingly, this change isn't just happening in the legal field. In fact, a 2019 McKinsey report, *The Future of Women at Work*, claimed that between 40 million and 160 million women globally in LAA positions will need to transition their jobs to higher-skilled roles by

“Smart law firm leaders quickly realized that elevating the LAA function to a strategic partnership in client service delivery helps their firm demonstrate to clients a commitment not only to efficiency but also to deep collaboration and comprehensive service.”

2030. Although the LAA role is not gender-exclusive, the data from this woman-focused survey speaks volumes about how technology adoption is forcing LAAs to explore and develop new skillsets.

Assistants used to tirelessly produce all of the documents for a matter, but many larger firms now farm out this type of work to centralized locations that use AI and machine learning technology to streamline document production. With the help of AI, legal assistants can now produce sophisticated and highly accurate documents faster than ever.

With this time-consuming task handled by machines, legal assistants can act more like project managers. They are now charged with reviewing documents to ensure the AI tools create content that meets client needs, digitizing existing content and teaching the software to produce better documents in the future. They are also being asked to oversee document management, organize the increasing amount of data collected during a case and communicate this information with the lawyers and clients involved.

On top of that, the productivity gains allow each LAA to focus on the vital duties that only a human can do, such as interacting with clients and third-party vendors while helping lawyers prepare for hearings, trials and corporate meetings.

AUTOMATING THE MUNDANE

When firms use AI and other modern technology to gather useful data and insights into matters, they gain the benefits of eliminating data silos and creating a centralized data repository. This shift also underpins increasingly successful business development efforts, faster conflicts clearance, more effective execution of client requirements, and improved pricing models. No longer do LAAs, paralegals or junior lawyers need to manually comb through reams of data to check for conflicts and client billing constraints. AI-enabled software handles that work quickly and efficiently, alerting firms to problems or issues early in the matter lifecycle. Thus, clients never see an incorrect bill or discover too late that their counsel is conflicted out of working the matter.

While the idea of software automating the rote tasks that can fill a legal assistant's day may worry some, it actually complements the work they do and augments it in a way that enables growth.

Automation is not just a way to increase productivity and save money for the firm and its clients. In many ways, LAAs are now empowered to handle many of the duties traditionally handled by paralegals — including the duty of answering phones and

speaking with clients before they meet with the attorney. This new role makes intricate matter knowledge and people skills, especially the ability to patiently interact with a frustrated client, more important than ever for LAAs, as it can determine whether that client chooses to stay with a firm or take their business elsewhere. And, in turn, it creates relief for paralegals and lawyers alike. Paralegals are enabled to up-level their skills to perform more of the high-value non-legal work that many lawyers were doing in the past, and lawyers can focus keenly on legal matters and producing the best client outcomes possible.

IMPROVING THE CLIENT EXPERIENCE

In the face of increasing client demands for more competitive pricing, firms feel pressure to cut costs and provide exceptional service on every matter. By using automation to perform the repetitive matter-related tasks and freeing up legal assistants to handle higher-value work, the senior lawyers can provide superior service to the client.

As one example, when a matter crosses a given milestone, multiple activities are triggered: standard documents may need to be drafted, internal and external email communications may need to be sent, calendar events may need to be scheduled, and items may need to be filed in the firm's document management system. Forward-thinking firms are automating these types of activities, minimizing several hours of administrative work to just a few minutes. Not only does the matter become more profitable, but clients benefit from improved experience and outcomes.



The human touch of an LAA — a quick reply, an expedited meeting or even warm conversation — often bolsters clients’ positive impressions of the firm, providing a competitive advantage. Adding complexity to their responsibility, today’s legal administrative assistants may now serve as many as seven lawyers — almost doubling their workload from what it was just a few years ago. Scheduling, coordinating and confirming the work of the firm at such a scale requires the use of modern tools that help administrative assistants stay ahead of the volume while producing superior work and ensuring an excellent client experience.

ADVANCING LAAs AND THE FIRM

As automation continues to change the role of administrative support staff in law firms, these critical members of staff will need to develop new skills to become more mobile and tech-savvy. Although proper career development will undoubtedly require training and education, many firms are investing in certification programs and up-skilling because they help deliver

stronger outcomes for their clients, boosting repeat business and the firm’s overall reputation.

During these rapidly evolving times, firms have adjusted to meet general counsels’ demands for greater efficiency, billing flexibility, technology adoption, transparent communication and efficient matter coordination. Smart law firm leaders quickly realized that elevating the LAA function to a strategic partnership in client service delivery helps their firm demonstrate to clients a commitment not only to efficiency but also to deep collaboration and comprehensive service. In turn, LAAs gain a growth path focused on modern technology, higher-level thinking and client-facing service.

ABOUT THE AUTHOR

Dan Tacone is President and Chief Client Officer at Intapp, focusing on serving the technology and information needs of professionals in the legal industry.

 intapp.com/people/dan-tacone



2022 Web-Based Courses

Searching for a deep dive into law firm finance or human resources? Check out ALA’s web-based courses. Over six weeks, you and your cohort of classmates will meet online to learn from an experienced instructor. The interactive courses deliver educational content in various formats to suit different learning styles and reinforce practical skills.



HR 1: Employee Selection and Promotion begins January 13



HR 2: Performance Management and Compensation begins May 26



FM 1: Law Firm Accounting begins July 12



FM 2: Financial Information and Analysis begins September 13

REGISTER TODAY!

alanet.org/web-based-courses

ALA Congratulates Its 2022–2023 Board of Directors & Chapter Resource Team

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! These individuals will officially take office in May.

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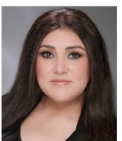
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Anniversaries, Awards and Appointments

Members on the Move »



Christina M. Cassidy, PHR, a member of the New Jersey Chapter, is now Director of HR at Nukk-Freeman & Cera, PC, in Chatham, New Jersey.



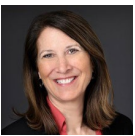
Claudia I. Fleischer, a member of the Calgary Chapter, is now Director of Accounting at Carbert Waite LLP in Calgary, Alberta.



Brenda L. Higley, a member of the Puget Sound Chapter, is now Litigation Paralegal Manager at Perkins Coie LLP in Seattle, Washington.



Shirley Laboy, a member of the Atlanta Chapter, is now Director of Administration at Bondurant Mixson & Elmore, LLP, in Atlanta, Georgia.



Mary L. Laschansky, a member of the Minnesota Chapter, is now Office Manager at Carlson Caspers Vandenburg & Lindquist PA in Minneapolis, Minnesota.



William D. McCall, a member of the First State Chapter, is now Administrative Manager at Freeman Mathis & Gary, LLP, in Philadelphia, Pennsylvania.



Terri J. Oppelt, CLM, SPHR, SHRM-SCP, a member of the Greater Los Angeles Chapter, is now Director of Operations at Johnson Shapiro Slewett & Kole LLP.



Gail Reysa, a member of the Greater Los Angeles Chapter, is now Executive Director at Hahn & Hahn, LLP, in Pasadena, California.



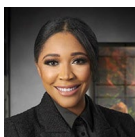
Jennifer J. Richardson, a member of the Tulsa Chapter, is now Office Manager at McAfee & Taft in Tulsa, Oklahoma.



Edna G. Rosen, CLM, a member of the South Florida Chapter, is now Banking and Trust Manager at Akerman LLP in Maitland, Florida.



Derek J. Ryan, a member of the Golden Gate Chapter, Executive Director at Joseph Saveri Law Firm in San Francisco, California.



Ralijah Sampson, a member of the Atlanta Chapter, is now Firm Administrator at Hegwood Law Group in Houston, Texas.



Deborah J. Smith, an independent member, is now Executive Director at Golenbock Eiseman Assor Bell & Peskoe LLP in New York, New York.



Morgan L. Smith, an independent member, is now Chief Legal Talent Officer at Frost Brown Todd LLC in Indianapolis, Indiana.



Cathi VanFleet, a member of the Mile High Chapter, is now Firm Manager at Fisher & Suhr PC in Denver, Colorado.

Anniversaries, Awards and Appointments



Sending Our Condolences

ALA is saddened to report that member David J. Federline has passed away at the age of 60. A certified public accountant, he joined Eckert Seamans Cherin & Mellott, LLC, as Chief Financial Officer in 2000 — and was once named “CFO of the Year” by the *Pittsburgh Business Times*. Before that, he served as the Controller of Kirkpatrick & Lockhart LLP (now K&L Gates) for more than 10 years. David was also a member of the Pittsburgh Chapter. Contributions in his memory may be made to the Knights of Columbus. Our thoughts are with his family, friends and colleagues.

ALA's 2021 COMPENSATION AND BENEFITS SURVEY

Managing a law firm is challenging, and the **2021 Compensation and Benefits Survey Reports** can play a key role in your success! Find out more about new remote arrangements for workers; expanded coverage for dental, vision and short-term disability; and bumps in salaries for various positions. To learn more about the survey, check out the following:

-  *Legal Management* article from Phillip Perry, “Law Firms Move to Retain Staff, Bolster IT in ALA Survey”
-  *Legal Management Talk* podcast with Phillip Perry, where he talks a little more in depth about the study
-  The Executive Summary, which can be downloaded for free

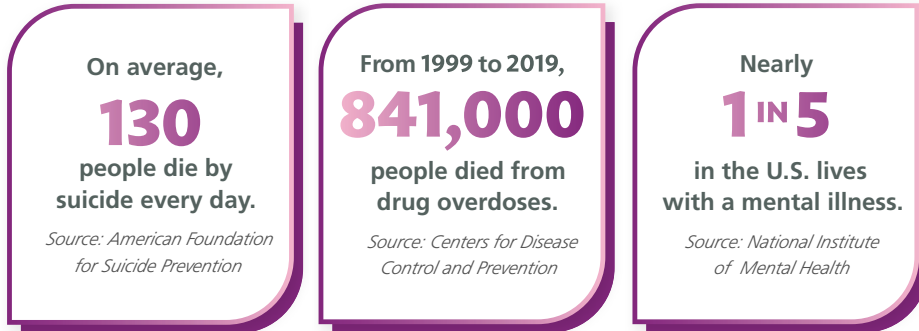
alanet.org/compsurvey



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.

DID YOU KNOW?







Learn about recognizing the signs with Mental Health First Aid Certification Program. The first dates are already full: That means all of its spots have been reserved by legal management professionals who are eager to expand their knowledge and get a handle on caring for their staff at a ceaselessly stressful time.

That leaves three more dates available: February 4, February 18 and March 4. If you're interested, you should move fast — each date is limited to 30 participants due to the program's highly interactive nature. The curriculum will teach you how to recognize the signs and symptoms suggesting a potential mental health challenge, how to listen nonjudgmentally and give reassurance, and how to refer someone to appropriate professional support and services.

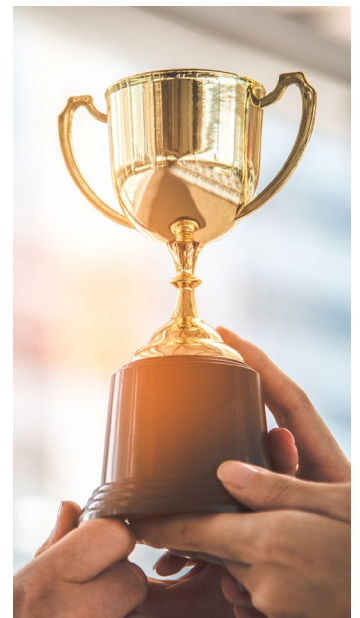
It consists of two parts. The first involves two hours of self-paced learning in an on-demand virtual format, which should be completed before the live course date. The second part is a live, 6.5-hour virtual session guided by an instructor.

2022 ALA Awards Program Deadline Approaching

January 21 is the deadline to submit an entry or recommend a colleague for one or more awards. ALA's annual awards program trains the spotlight on outstanding projects, initiatives and individuals — both to reward the participants and inspire the broader legal community. Help us recognize:

-  Chapters, individuals, law firms, legal departments, business partners and other organizations in the legal community that are advancing professional development, networking, visibility and inclusion with the Elevate ALA Award. Please note the criteria and submission guidelines for this honor were revised for the 2021–2022 awards cycle.
-  Members who will become prominent figures in ALA and the profession with the NextGen Leader Award.
-  Members who have gone above and beyond in their service with the Outstanding Association Volunteer Award.
-  Members who embody the values of ALA with the Spirit of ALA Award.

Additionally, submissions for the Presidents' Award of Excellence are due February 28. Chapter leaders handle these entries.



Open Now: The Foundation's Student Scholarship Application Period

Applications are open for the *Foundation of the Association of Legal Administrators' 2022 Student Legal Career Scholarship*. The program aligns with the Foundation's Student Visibility and Scholarship Initiative, which champions students as the future of the legal profession. This scholarship will award up to \$10,000 to eligible students!

The Foundation encourages students with an interest in a non-attorney legal career, including in legal management, paralegal studies or another legal support function, to apply. The scholarship is open to juniors and seniors enrolled in an accredited college/university, as well as those actively pursuing a master's degree. If you know someone in these circumstances, please pass along this information. Applications are due January 28.

Visit alanet.org/foundation for details.

