

LEGAL MANAGEMENT

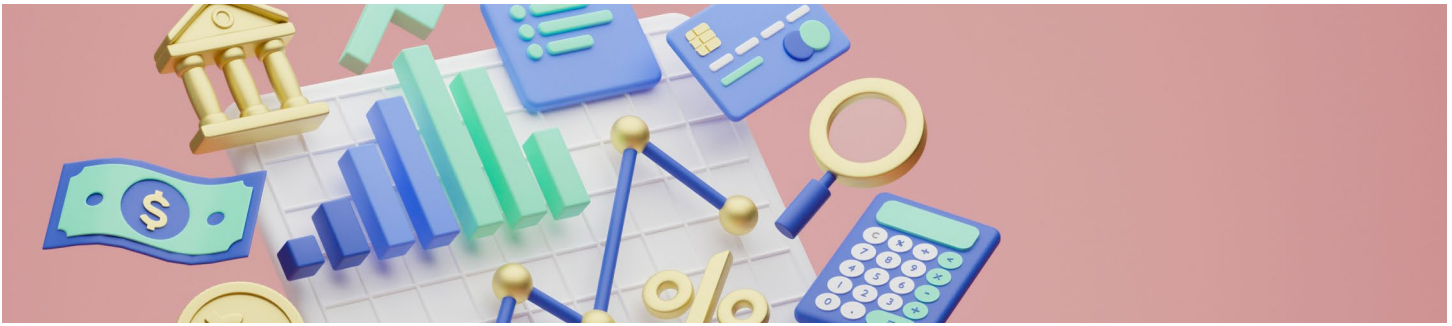
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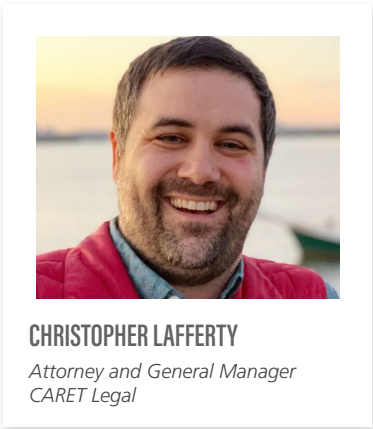
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5 Ways Practice Management Aids Law Firm Compliance

Maintaining compliance with various laws, rules and ethics requirements is a critical aspect of running a law firm. But ensuring that your law firm is fully compliant can be a costly and time-consuming task. In addition to performing their core legal work, firms are required to keep abreast of frequently changing rules and regulations related to complex topics such as data security, anti-money laundering laws and conflicts of interest. These efforts can be complicated, particularly for firms that choose to use spreadsheets, email contacts and shared servers to support manual processes.

“Effective risk and compliance management requires efficient oversight of information and financial resources, which can be a daunting task without the right tools and strategies in place. Law firm practice management software can streamline these efforts across various areas.”

Effective risk and compliance management requires efficient oversight of information and financial resources, which can be a daunting task without the right tools and strategies in place. Law firm practice management software can streamline these efforts across various areas. By providing a range of functions that cut down the time and cost involved in monitoring law firm activity, law firm practice management software can help firms meet their compliance obligations. Here’s where to start.

1. DOCUMENT DRAFTING

Contracts, agreements and legal filings are at the core of the practice of law, and any errors or omissions could lead to significant legal or financial consequences. To ensure accuracy and quality in document drafting, many law firms are turning to document automation software. Using templates and stored data to reduce manual effort speeds up the drafting process, allowing attorneys to generate documents by answering just a few simple questions.

Moreover, when compliance regulations change, updating the templates ensures that all staff have access to the most current forms and documentation. By adopting document automation software, law firms can improve their compliance efforts and reduce the risk of errors in critical documents.

2. DATA SECURITY

The safety and security of client data are of utmost importance to law firms, and any breach of that data will have potentially major ethical, reputational and legal implications for the firm. Unfortunately, the 2022 ABA Cybersecurity Tech Report revealed that 27% of law firms had experienced a form of security breach. With the high risk of cyberattacks and unauthorized access, it is essential that firms have robust security measures in place.

To ensure compliance with cybersecurity requirements, law firms must implement adequate security measures, train employees on best practices and stay up to date with evolving threats. One solution that has gained popularity is cloud-based legal practice management software. Cloud providers manage secure access, data encryption and protection, offering peace of mind for law firms.

When selecting a practice management provider, it is crucial to choose one that is audited and compliant with SOC 1/ ISAE 3402 and SOC 2. These are rigorous compliance standards established by the American Institute of Certified Public Accountants to make sure businesses don't take on undue cybersecurity risk. By choosing a compliant provider, law firms can more effectively ensure that their client data remains secure and protected.

3. CONFLICTS OF INTEREST

Managing conflicts of interest is critical for law firms to ensure that accepting a new client will not have an adverse effect on existing client relationships or ongoing cases. This can be particularly challenging for firms that work with large corporate clients or operate in multiple practice areas.

When firms store client data, case information and documents in disparate locations, applications and desktop folders, the process of identifying conflicts of interest is time-consuming and subject to error. By comparison, an effective practice management system will keep all data on clients, cases, documents and financial transactions in one system, where global searches can quickly identify potential conflicts.

4. ANTI-MONEY LAUNDERING LAWS

Complying with anti-money laundering laws and regulations is essential for law firms as violations can result in severe penalties and reputational damage. Law firms must conduct due diligence on clients and report suspicious activities to regulatory authorities. The consequences of knowingly or inadvertently facilitating money laundering can be extreme, so it's crucial to take preventative measures.



One way to reduce the risk of improper financial activity by a client is to implement know-your-client policies when engaging a new client or accepting a new case. Law firms should also collect information about the client's source of funds and perform background checks to ensure that the client is not involved in any illegal activities.

A strong practice management system can aid compliance efforts by providing integrated accounting and detailed financial analytics that help firms monitor financial transactions and identify out-of-bounds activity.

5. TRUST ACCOUNT MANAGEMENT

To comply with federal Interest on Lawyer Trust Accounts (IOLTA) laws that regulate lawyers as a fiduciary of the client, lawyers must not mix funds received from a client with any personal or firm operating funds. Trust accounting is a central component of ethics and compliance and unique to law firm management. However, many firms use standard business accounting software programs that are not designed to support trust accounts.

Instead of implementing workarounds in a general accounting program, firms can ensure compliance with IOLTA trust accounts using trust account management features within their law firm practice management system.

COMPLIANCE MANAGEMENT IS PRACTICE MANAGEMENT

To reduce risk and improve compliance in law firms, prioritizing education for all employees is key. Most law firm employees, from partners to administrative staff, have access to sensitive information and communications that, if mishandled, could raise serious compliance issues or risk a data breach. Effective training on the regulations, bar rules and compliant workflows and procedures can reduce risk by helping employees to understand the ethics and regulatory requirements of the firm and procedures for reporting any concerns.

Maintaining compliance with laws, rules and ethics requirements is a crucial aspect of running a law firm. With the stakes so high, it is essential to ensure that your law firm is fully compliant. Ensuring compliance can be complex, time-consuming and costly to address, particularly for firms that have manual processes, handle sensitive client information or operate in multiple jurisdictions with different legal and regulatory requirements.

Fortunately, law firm practice management software can streamline compliance efforts by providing a range of functions that cut down on the time and cost involved in monitoring firm activity. By leveraging these tools, law firms can simplify their compliance processes, improve accuracy and reduce the risk of compliance violations, freeing up resources to focus on core legal work.

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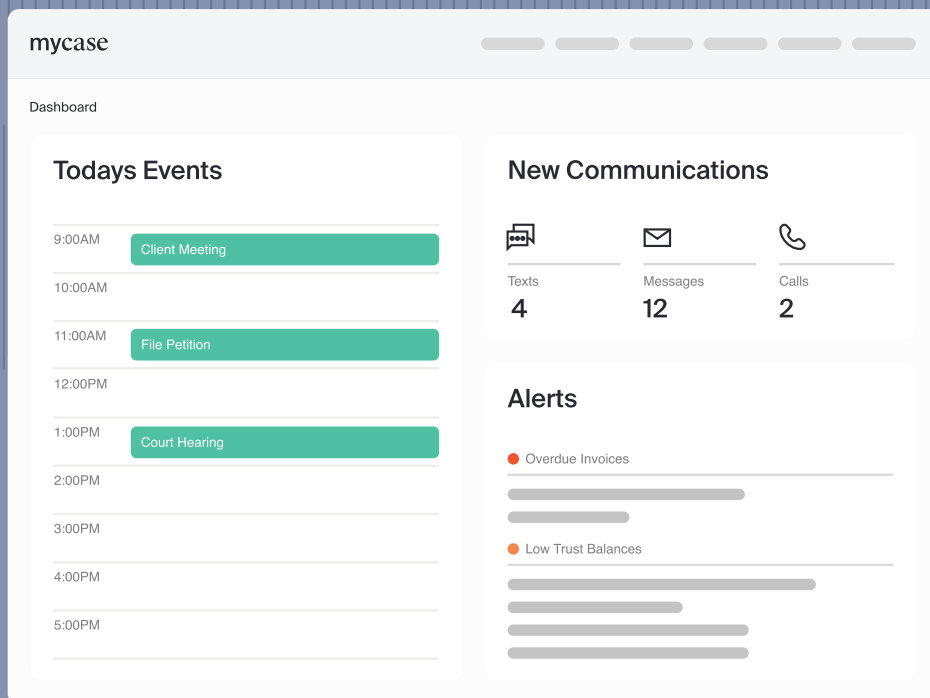
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ROSS FISHMAN, JD
Chief Executive Officer
Fishman Marketing

4 Steps to Get Your Lawyers on Board with Your Marketing Ideas

Here's a sentence I've often heard marketers say: "When I want to get the lawyers on board, I always make it their idea." I've never cared for that approach — that's not respecting the lawyers as intelligent adults. They're smart, tough professionals who only bestow their respect upon those who have earned it. And marketers who let others take credit for their ideas are teaching their employers that they don't have any good ideas of their own.

Some time ago, I was asked how I structure my arguments to achieve effortless buy-in of innovative ideas and initiatives with skeptical groups of lawyers and marketing committees. My answer: It all comes down to education.

Logically, if what I'm recommending is the best idea or action, and I can teach lawyers what they need to know to position them to make a good decision, then they should see that I'm right and agree with me. However, if they disagree with what I'm proposing, then either I was wrong or I've failed to educate them sufficiently.

As marketers, we spend eight hours a day thinking about marketing — our lawyers may not spend eight hours a year. We exhaustively research every variable before recommending a particular course of action to the marketing committee. Why should we expect lawyers to have all the answers the first time we throw it at them?

Regardless, in spite of their lack of information and education on any particular topic, if the lawyers are asked, they'll always have an opinion. And once they voice that opinion in front of others, it's very difficult to persuade them to change it. So before we allow them to subconsciously formulate that opinion, we must get them to buy into our view on the topic.

To do this, I always follow a formula that has increased my professional effectiveness and is arguably the most vital lesson I teach marketers. To illustrate this formula in action,

“Some time ago, I was asked how I structure my arguments to achieve effortless buy-in of innovative ideas and initiatives with skeptical groups of lawyers and marketing committees. My answer: It all comes down to education.”

Let's start with a simple example: We are looking to redesign a firm's letterhead to remove a long list of lawyer names. Here's how to start.

Step 1: Do not lead with the conclusion.

That is, I do not open with my closing statement of, "I think we should remove the names from our letterhead." If I do that, they'll identify 100 reasons why I'm wrong, such as, "We've always done it this way," "Everyone does it this way," or, "My clients like seeing my name up top!" Once that argument starts, I've already lost. Alternatively, we must first provide them the information that will allow them to make a well-informed decision.

Step 2: Give the big picture.

In this case, I might start by quickly discussing design trends in the legal marketplace and what the leading firms are doing. I'd show actual examples of beautiful design from competing local firms that don't have the lawyers' names on them.

I'll also validate that what they currently have was the right answer at the time it was created, but that since then, design has changed — as it always does over time. I might mention other obvious types of designs that have changed since the time this letterhead was created. Back then, men were wearing three-piece suits, suspenders and yellow ties, while women lawyers had stiff, poofy hair and dresses with shoulder pads rather than the more open and casual approach we have today. The business culture is less formal than it was back then, and today's design reflects that.

Step 3: Create hard evidence in support of your argument.

I might provide highlighted copies or pull relevant quotes from any articles and blog posts that discuss and support the removal of names from the letterhead. I'll ask a friendly engraving or printing company how many of the past 25 letterhead redesigns they've printed have included all the lawyers' names and quote them. I'd ask a client which design they prefer — all the better if the client provides quotes you can use. Lawyers are persuaded by client quotes.

I'd print out a sample letter on the current letterhead, then paste that same text into one of the printing company samples that aren't cluttered with all the names and show them how much more content fits on the new style — fewer two-page letters.

Step 4: Bring the argument home.

After they're fully educated about this topic, now I can suggest that I'd like to update the firm's letterhead to the same type



of modern layout that all the top firms are using. At this point, they have learned why what they have isn't good anymore. They may have walked into the meeting loving their stationery, but 20 short minutes later, I've taught them to hate it, in a friendly, educational, interesting and highly professional way.

This is the structure I use when pitching anything. I recommend that all marketers and administrators use it regardless of what we are seeking their agreement to — whether it's a new piece of technology we want to purchase, a marketing-training program or another initiative we want to launch, a new employee to hire, or a big raise or bonus.

One added benefit of doing it this way is that we don't have to "make it the lawyers' idea." I want marketers to make it their idea. It's a good idea, it's the right idea, and we are gradually teaching the lawyers that we are high-quality professionals whose ideas and efforts they should respect and trust. We're not winging it — we're approaching our decisions with a thoughtful, well-researched process and methodology that they can understand and respect, just like they'd have done it themselves if they were in our shoes. Your lawyers will appreciate it.

ABOUT THE AUTHOR

Ross Fishman, JD, specializes in branding, websites, and marketing training for law firms. A former litigator, marketing director, and marketing partner, he has helped hundreds of ALA member firms dominate their markets. A Kentucky Colonel (like Col. Sanders), Fishman was the first inductee into the Legal Marketing Association's Hall of Fame, and recently negotiated the safe end of a 12-hour armed police standoff. (No, really!) He's written 10 books on marketing, all of which are available on Amazon.

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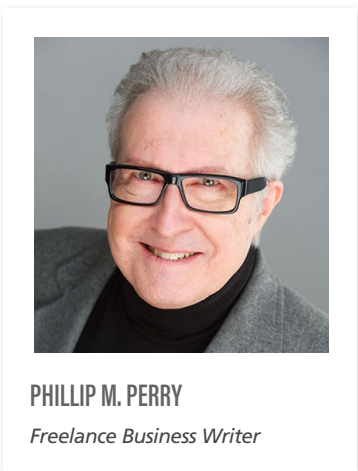
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Highlight Your Firm’s Assets to Attract the Best Associates

Setting associates — and your firm — up for success starts with your hiring process.

Hiring the right associates can be time-consuming and prone to errors. Is there any way to lessen the risk of a making bad choice?

Advisers say the answer comes in three parts: First, identify and communicate whatever helps your firm stand out from the competition. Second, avoid selling your firm short by looking upon it as less attractive than larger ones with their heftier paychecks. Third, make an effort to understand the motivations of the new crop of associates coming onto the scene.

“Too often law firm leaders are tone deaf in their hiring, thinking it’s all about salary and about finding the brightest students from a limited number of schools,” says Timothy B. Corcoran, Principal of Corcoran Consulting Group and an Independent member. “What it takes to be successful is far more nuanced than being a top academic achiever. There are fantastic associates available at all times to all firms, but they’re often overlooked because of one-dimensional recruiting.”

It’s not only on law firms, of course, to prove their worth. The market has turned leaner for associates as the legal environment adjusts from its post-pandemic hiring frenzy. In less frenetic times, associates have to ready their best pitch.

“It’s not good enough just to have credentials,” says JB Pullias, a Senior Director at VOYlegal. “Firms are hiring people with specific skill sets for specific purposes to fill gaps in a deal or litigation team. So people who have not developed those skills are going to really struggle in this market. A midlevel [mergers and acquisitions] associate who has never drafted a key agreement is going to have a tough time competing with others who have.”

“It’s not good enough just to have credentials. Firms are hiring people with specific skill sets for specific purposes to fill gaps in a deal or litigation team. So people who have not developed those skills are going to really struggle in this market.”

CULTURE FIT

Given the tighter job market, it follows that medium-sized and smaller firms are in better negotiating positions. “During these slower times, associates may be willing to look at smaller firms if larger ones have over-hired for demand they can no longer sustain,” says Corcoran.

It’s true that leaner times carry a danger: Some prospective hires may see smaller firms as temporary landing places while they chase higher salaries elsewhere. But a firm can avoid hiring these candidates by leveraging the power of a good culture fit.

“Midsize firms will often lament that they cannot compete on a salary basis with the biggest ones,” says Corcoran. “While that will always be true, what they fail to notice is that if they’re interviewing an associate in the best and brightest category, that candidate has already made a decision that a top salary is not a requirement, otherwise they wouldn’t be applying at a mid-sized firm. Of course, they want to be well paid, but they’re looking for something different.”

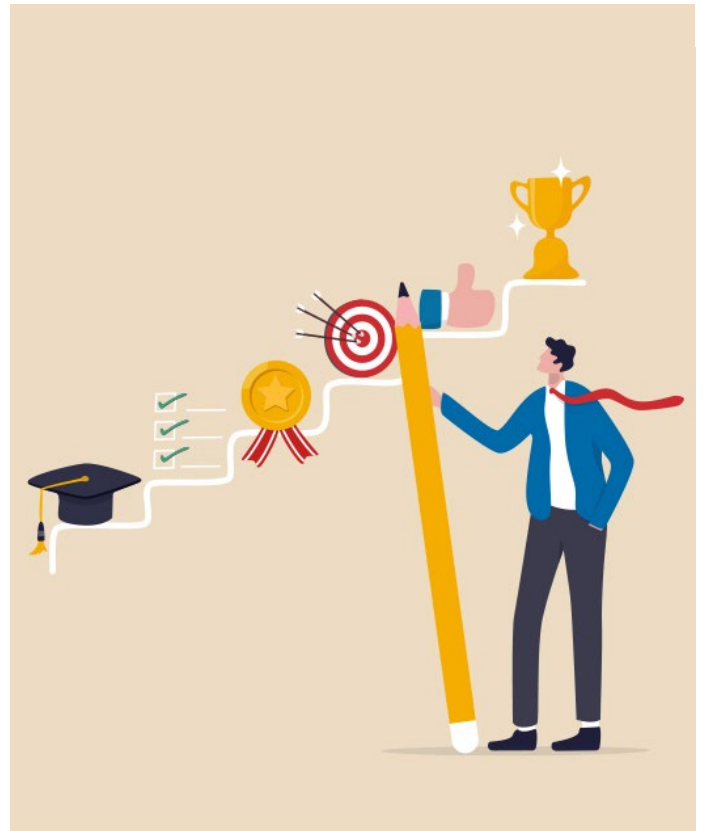
Today’s candidates are particularly attuned to the dangers of high-stress environments. “Thanks to the insanity of COVID and the resulting workloads, many attorneys have gotten a little jaded about the practice of law or just burned out,” says Pullias. Smaller firms can be seen as attractive havens. “New associates are not necessarily looking for fewer hours, but for more certainty about their expected levels of commitment,” he says. “Will they need to be available 24/7 so they can never take a break or a vacation? And how about the availability of remote work?”

Candidates have their antennae out for unhealthy work environments, too, says Pullias. “Are toxic individuals tolerated because they are rainmakers and bringing in tons of money? That’s a hard thing to find out in an interview, but people do get reports from colleagues.”

These concerns are part of a larger push in our culture right now to focus on mental health, notes Pullias. “While work-life balance is somewhat of a myth when it comes to being an attorney at the highest levels, people are still looking for firms that are a little bit more realistic in their expectations of associates.”

STANDING OUT

While associates will be attracted to healthy work environments, law firms should also make a point of identifying and communicating other unique benefits, says



Corcoran. Maybe they can give associates more client contact, greater courtroom action and more live hands-on legal work earlier than other firms. Maybe they have a different path to partnership. And maybe they have a path for the high contributing associate who never wants to make partner.

Candidates in the Gen Z pool will be especially impressed with programs of diversity, equity and inclusion (DEI). “DEI is a huge focus in the legal field right now,” says Pullias. “Younger associates value it, maybe at an outside level compared to others. They want to know that they are entering a firm that is trying to progress humanity forward.”

Some firms may be quite willing and able to be progressive in their approach to the practice of law, noted Corcoran. If adapting to new ideas and embracing technology is something the firm fosters, that information should be highlighted in the recruiting pitch. “Maybe the firm will entertain nonhourly fees, or innovative technologies. Or maybe it will allow associates to get involved more quickly in client interactions or participate earlier as first or second chairs on trials.”

And what if a firm does things the old-fashioned way? Nothing wrong with that, but it needs to be communicated as well.

“Associates want to know what they are getting into when they join the firm,” says Corcoran. “You don’t want to recruit bright-eyed people, fresh out of law school where they’ve been taught to use technology and embrace new approaches, only for them to find out they will be expected to practice the way everyone’s practiced forever.”

CAREER ADVANCEMENT

One final thing: Associates are looking for firms that will help them advance their careers, according to Pullias. “Many associates will value coaching and mentoring programs that train them in the skills they need to take them to a higher level,” he says.

Transparency can be as important in career growth pathways as in other elements of law firm operations. “It’s very often mystical as to what combination of contributions will lead to advancement to senior associate and eventually to partner,” says Corcoran. “No one expects the first-year associate to be a rainmaker while they keep their heads down learning their craft. But a few years in, maybe the firm expects them to exhibit the ability to lead a team and manage a matter, and to find opportunities outside the firm to create visibility and earn some business.”

The law firm that has a policy of not sharing such information should be upfront about it, says Corcoran. “They may say that they expect the associates to work hard as lawyers and at some point in the future they will discuss what it takes to advance in the firm. That’s fine — keep it secret if you wish, but then tell recruits that the path to advancement is secret.”

Transparency is the name of the game. Law firms that identify their unique selling propositions and communicate them to prospective associates will increase the odds of making hires that last.

“It’s very much about identifying what it takes to be successful in the firm and articulating that to recruits,” says Corcoran. “Firms will likely end up with much better fits when associates come in with their eyes wide open.”

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Phillip M. Perry is an award-winning business journalist with over 20 years of experience under his belt. A three-time recipient of the American Bar Association’s Edge Award for editorial achievement, Perry freelances out of his New York City office. His byline has appeared over 3,000 times in the nation’s business press.

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“The firms that offered flexible arrangements, even if they ultimately didn’t take hold, very much improved their relationship. They were able to gain and improve the trust levels they had.”

A New Take on Client Collections

The pandemic led to a variety of billing and payment process changes — which some law firms are continuing to embrace as they move forward.

Law firms saw an uptick in business during the COVID-19 pandemic; a number of their clients, however, experienced a very different trajectory.

In the first few months of the pandemic, more than 3 million small businesses became inactive — the largest drop on record, according to one economist’s analysis. Nearly two years later, many still faced challenges: A 2022 Goldman Sachs survey found 71% said the Omicron variant had negatively impacted their revenue.

Small businesses weren’t the only organizations with continuity challenges. Corporations, too, struggled during the pandemic, with oil and gas, recreation and other industries suffering significant losses.

Fairly early on in the pandemic, to reduce the risk of clients defaulting on their payments, some law firms began either preemptively offering or accepting requests for different fee structures.

“We certainly saw them at the beginning of the pandemic,” says Michael Rynowecer, President and Founder of BTI Consulting Group. “You had a lot of very customized billings as companies tried to figure out their cashflow. Some firms said, ‘For the next six months, we’ll defer billings, or we’ll change the billing structure.’”

In 2021, the year after the pandemic’s onset, law firm profits rose to record levels across all market sectors, according to a report from Thomson Reuters and the Georgetown University Law Center on Ethics and the Legal Profession. Seventy-four of the Am Law 100 firms experienced an increase in gross revenue.

“It’s great to be aligned with the client and be on their side, not just in principle, but in reality. Something I noticed that really changed was I was helping a lot of people who wouldn’t have gotten help otherwise and that made me feel good. It made my clients feel good; and it’s going to pay dividends for the firm in the long run, because happy clients tend to tell other people.”

Law firms’ billing practices, according to research from the Private Bank Law Firm Group and Hildebrandt Consulting, played a key role in helping firms perform better than they expected during the pandemic.

REVISITING PAYMENT PROSPECTS

By summer 2021, the demand for alternative fee arrangements (AFAs) in North America had increased by 28%, according to a survey conducted by legal tech provider BigHand.

The options that law firms offered ranged from introducing fixed or capped fees, a technique 40% employed, to providing extended payment terms, which 41% of firms initiated.

Thirty-five percent utilized upfront billing practices or charged clients at certain milestones in a matter; 39% offered some type of discount, such as supplying a lower version of their standard rates or reducing their overall fee if they received payment early.

Miami-based Novela Law had used flexible billing practices with some clients prior to 2020. During the pandemic, the firm took on more fixed-fee engagements, says founder Daniel Novela.

“We represent some restaurant groups that were hit very hard; even people in real estate development, for a while, it was all kind of frozen,” Novela says. “People really became cost flow-conscious. They didn’t know where things were going to be in the future, so they were really pushing [the notion of], ‘We don’t want some open-ended engagement; we want to know what this is going to cost.’”

Novela priced matters by drawing from past experience and incorporating specific parameters.

“I try to be very, very precise — because I don’t know exactly where things are going to go,” he says. “[I would say], ‘The engagement is for these four things, and this is the price. Anything beyond that, we have to revisit either the fixed fee or go hourly.’”

His firm has tried to be flexible in other ways, as well.

“Sometimes it isn’t just a question of fixed-fee billing,” Novela says. “If a company is in distress, they may need to make other changes from time to time. We’ll work around that. If there’s a transaction that’s pretty significant for them, we’ll say, ‘We could spread out those payments over a period of time.’”

BILLING ADJUSTMENTS’ FORTUITOUS EFFECT

In addition to ensuring funds continued to flow into the firm, providing a greater amount of payment choices helped some law firms strengthen their relationships with clients, Rynowecer says.

“The firms that offered flexible arrangements, even if they ultimately didn’t take hold, very much improved their relationship,” he says. “They were able to gain and improve the trust levels they had. Clients felt law firms really understood their business because they would know these organizations might be more affected by cashflow.”

Business litigation firm Chatow Law adjusted some of its billing and payment practices during the pandemic, including entering into a trade agreement with one of its clients, a popular local restaurant that paid for some of the firm’s work with gift cards.

Principal Mark Chatow had traditionally taken some cases on contingency, but he realized early in the pandemic that it might present an opportunity to grow that part of his practice — and began more aggressively marketing the contingency fee option.

“I created a bunch of content for my website,” Chatow says. “I really started to home in on outreach [to] other attorneys I would talk to, and the referral basis started to grow. It was good timing because there were a lot of attorneys getting cases that weren’t a fit for them, so they were happy to refer cases, and maybe they’d make some money from it. [For] one that got referred to me during the pandemic by an attorney, we just wrote a check for \$124,000 for his referral fee.”

“Proactively taking steps to adjust billing methods, when it seems appropriate, can potentially help build goodwill — and strengthen clients’ sense of loyalty.”

Chatow’s promotional efforts resulted in more potential work coming through the door — giving him, he says, a better selection of contingent cases to choose from.

“I was able to really pick the ones that made sense,” he says. “Surprisingly, there were some other ones that didn’t make sense on a contingency basis, but they liked my approach, and we ended up working hourly [for them]. It turned out to be a good lead generator for some hourly cases.”

Although strengthening client relationships may not be a central concern for Chatow’s firm, which doesn’t generally handle a lot of repeat business, contingency work, he says, can potentially be more lucrative than hourly billing — and may also provide other indirect benefits.

“It’s great to be aligned with the client and be on their side, not just in principle, but in reality,” he says. “Something I noticed that really changed was I was helping a lot of people who wouldn’t have gotten help otherwise and that made me feel good. It made my clients feel good; and it’s going to pay dividends for the firm in the long run, because happy clients tend to tell other people. The clients I take on contingency are eternally grateful — that leads to referrals; it leads to great reviews.”

THE IMMINENT PAYMENT LANDSCAPE

Despite the various payment-related changes firms have made in recent years, a number, Rynowecer says, have since returned to their pre-pandemic hourly billing practices.

“Those largely started to dissipate, as both clients and law firms realized cashflow, with all the government aid and fiscal policies, wasn’t going to be nearly the pervasive issue they thought,” he says. “There’s been a decline in alternative fee arrangements because the workload is so compelling in litigation, for example, and regulatory and labor and employment. And the turnover at law firms and corporate counsel offices makes it difficult to hammer out exactly what those fee arrangements would be, because they haven’t reached the trust point one needs to.”

Some firms, though, have continued to use the billing and payment structures they adopted during the pandemic.

Shield Law Group, APLC, for example, saw an influx of roughly 50% more bankruptcy inquiries during and after the pandemic, says John Sarai, the firm’s Owner and Managing Attorney.

The subsequent increase in business allowed the firm to relax the timeframe involved in clients completing a series of payments leading up to their Chapter 7 filing. While typically, the firm hadn’t extended the duration beyond three months, during the pandemic, some clients took up to a year.

“There have been times where the situation they’re in, they can afford maybe a \$100 a month, and we set up automatic payment plans,” Sarai says. “When it comes to bankruptcy, the more cases that come in, the more return on investment you have and the more profitable the business becomes because it’s a flat fee. [The] increase in clients makes up for any reduced fees or costs we incur by having to drag a case out.”

Shield Law Group also, in some instances, offered to reduce its fees during the pandemic if clients could pay off the total sooner — which, after exemptions like rent moratoriums became available, some were eventually able to do, Sarai says.

In Chapter 13 cases, where debtors pay a certain amount each month on an ongoing basis that’s distributed to creditors by a trustee, the firm was able to charge less upfront.



“A Chapter 13 bankruptcy fee, set by the courts, is a maximum of \$5,000,” Sarai says. “But we would say, ‘We can get your case filed for \$2,000, and then whatever’s left gets paid over five years as a small percentage of your bankruptcy payment.’”

With the threat of a potential recession currently looming — which could again cause client solvency issues — to increase the likelihood law firms will continue to be paid on a timely basis in the future, Novela suggests ensuring your firm remains a useful asset.

“Clients have a lot of vendors that need to get paid, and you’re just one of them,” he says. “When things aren’t going so well, they don’t see the value in the legal work the way they used to. If they feel like you’ve provided all the service you can and they don’t need you anymore, it’s going to be harder to get paid. But if they see this is a relationship [they] need to continue — even if it’s a discounted amount because they’re in financial distress — you’re going to get something.”




Law firms don’t need to wait for a health crisis or faltering economy to accommodate clients’ financial needs; proactively

taking steps to adjust billing methods, when it seems appropriate, can potentially help build goodwill — and strengthen clients’ sense of loyalty.

“We’ll be working on a deal for months, and the deal doesn’t close — things just change, or the client decides they don’t want to buy it anymore,” Novela says. “A lot of times, we’ll give the client a discount, because I get it — there was an intention to do something, and now there’s a big bill to be paid. I know there’s going to be another deal later. It’s just a question of working with your client; long-term, if you’re their partner, they’ll be your partner, too.”

ABOUT THE AUTHOR

Erin Brereton 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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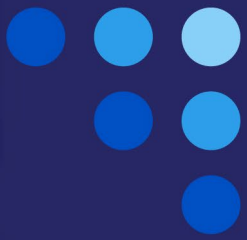


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KYLIE ORA LOBELL
Freelance Writer

“Allocating work fairly can eliminate complaints and resentment. It can also boost morale and make each team member feel respected.”

5 Ways to Fairly Allocate Work to Paralegals and Associates

Ensuring fairness in work distribution can keep burnout at bay.

The legal field is notorious for burnout. And it’s not just among the partners — it can happen to everyone involved on the team, including paralegals and associates.

However, paralegal and associate burnout is not always visible. Take into account that there is a plethora of studies on lawyer burnout, but little to no research has been done on what happens to support staff in these environments. Much of the time, they’re silently struggling to keep up.

“Paralegals and associates are often overburdened with work, especially in firms with a high case volume,” says Jaclyn Roberson, Senior Partner at Roberson Duran Law, PLLC, in San Antonio, Texas.

Because of this, it’s absolutely crucial for law firms to allocate work to paralegals and associates in reasonable and manageable ways. It will not only help support staff be more productive, but it can also result in better overall attitudes in the workplace.

“Allocating work fairly can eliminate complaints and resentment,” says Roberson. “It can also boost morale and make each team member feel respected.”

Here are some ways in which law firms across the country are distributing work to paralegals and associates and, at the same time, ensuring fairness all around.

ASSESS CURRENT WORKLOADS

First, firms need to assess the current workload for paralegals and associates. At Sugarman, Rogers, Barshak & Cohen, P.C., the firm has an intake committee that monitors associates’ and paralegals’ workloads and assigns new work based on their capacities.

“By setting realistic expectations for working hours and building a supportive culture that values personal well-being, firms can reduce stress and prevent burnout among their staff.”

“Many times, requests come in for specific assignments, and the committee evaluates those in conjunction with the larger universe of capacity and availability of the associates and paralegals to ensure no single person is overloaded,” says Christopher B. Hunt, Executive Director at the firm and an Independent member.

The committee at Sugarman, Rogers, Barshak & Cohen, P.C. will look at the current workload assigned, what type of work is being done, the capacity to take on additional work, and if there are areas for development or improvement that an assignment can advance.

“The aim is to provide as much opportunity as possible and exposure to many areas of development,” says Hunt.

ASSIGN CASELOADS BASED ON CLIENTS

Having paralegals and associates assist certain partners may not work for every firm. Furthermore, it could be causing burnout. Instead, firms might consider assigning based on clients.

“Assign caseload based on clients, not attorneys,” says Emily Porter, Executive Director at Renner Otto and an Independent member. “Standardization comes relative to the clients’ treatment rather than the attorneys’ preferences, and then you can more easily identify true burden on the paralegal.”



Additionally, Porter noted that firms need to weigh support staff’s strong points as well. “You have to take into consideration that not all paralegals are created equal,” she says. “You need to identify people’s strengths so that you’re utilizing individual strengths.”

It might also mean bringing on more staff. Law firms, especially midsized ones, are facing staff shortages in the aftermath of the pandemic. According to the 2023 Midsize Law Firm Priorities Report from ActionStep, 92% of firms surveyed reported staffing or resource shortages. Now more than ever, it’s critical to make sure that robust teams are in place to handle the workloads coming in.

“Many law firms are understaffed,” says Roberson. “If necessary, bring on new team members to help with the workload.”

LET TECH HELP

There are a number of case management software offerings that can help track workloads. For example, Shepelsky Law Group uses CLIO for case management, because “this platform can simplify task assignment and monitoring, enabling firms to track and manage deadlines, priorities and tasks,” says Marina Shepelsky, Esq. “This guarantees transparency and accountability in the work allocation process. Furthermore, scheduling regular team meetings can promote effective coordination and alignment for ongoing and upcoming assignments.”

When looking for the right case management software, firms should make sure that it’s accessible from anywhere, according to Eric Wangler, President North America at BigHand.

“Firms need a task delegation solution that is easy to access from where the lawyers typically live, whether that is the [document management system], their email or mobile device,” he says. “Ultimately, lawyers and support staff benefit from this as it reduces the administrative burden on lawyers, improves service and avoids employee burnout.”

ENCOURAGE OPEN COMMUNICATION

Firms must encourage paralegals and associates to speak up when they need something, as well as put processes in place that push for open communication among all team members.

This could include creating an open forum, holding weekly staff meetings with firm management, making meetings enjoyable and asking people to submit suggestions for improvement, according to Porter.

“Communication and communication style are by far the most important skills to hone when it comes to happy paralegals and happy firms,” says Porter.

REMEMBER TO EMPHASIZE EMPLOYEE WELLNESS

You’re hearing a lot about employee wellness these days because it matters.

“By setting realistic expectations for working hours and building a supportive culture that values personal well-being, firms can reduce stress and prevent burnout among their staff,” Shepelsky says.

Once firms have figured out what processes to use and systems to put into place, they need to build their employee wellness programs as an additional way to ensure employees are satisfied and productive. At the Lovely Law Firm, employee wellness includes massage days, firm dinners and happy hours outside of the office.

“Staff needs a break just as lawyers do,” says Justin Lovely, the firm’s Founder and Partner. “We have also implemented a community service working day each month where the whole

team gets out of the office and helps local charities. Staff and attorneys are paid, and they are making a difference in local nonprofits. It’s a win, win, win scenario for all involved and helps with the daily grind.”

Shepelsky encourages her employees to take breaks, prioritize self-care and use their vacation days in order to promote work-life balance.

And when work is allocated fairly, employees will have what they need to succeed — and law firms will reap the benefits.

“It creates a positive and inclusive work environment, where trust, morale and teamwork among team members thrive,” says Shepelsky. “This ultimately enhances overall productivity and job satisfaction within the team.”

ABOUT THE AUTHOR

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

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“I love paperwork!”



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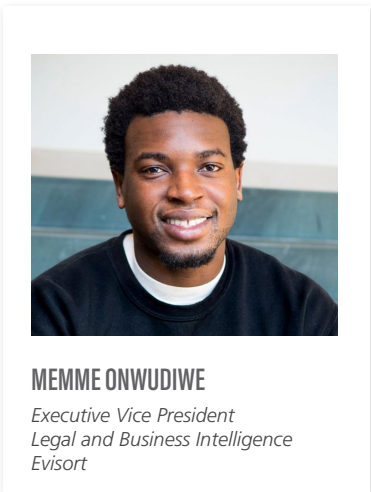
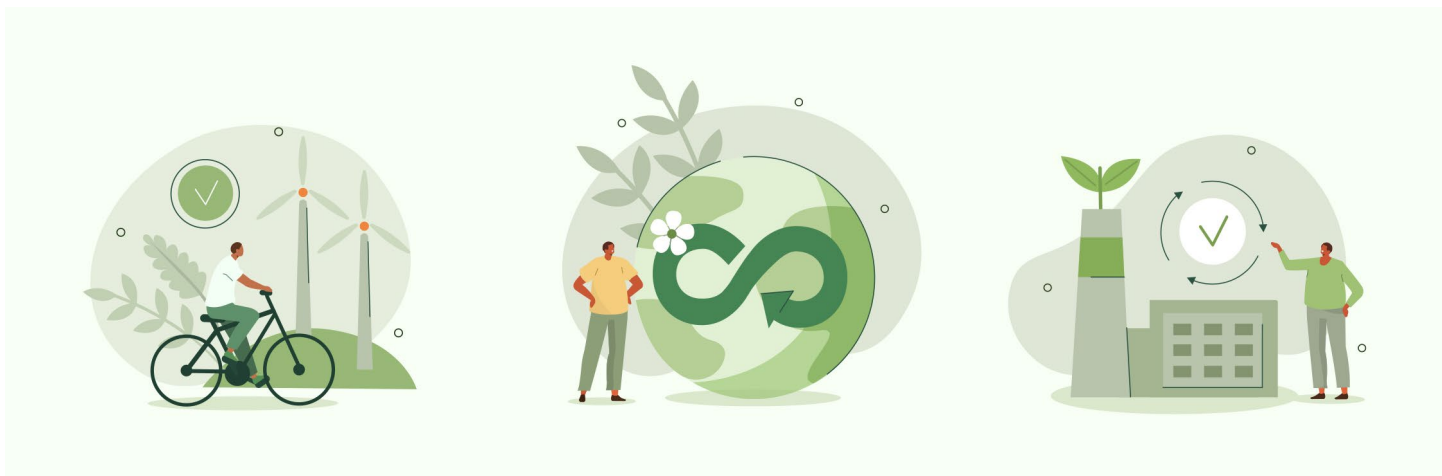
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MEMME ONWUDIWE
*Executive Vice President
 Legal and Business Intelligence
 Evisort*

“As businesses face increasing demands for ESG transparency from stakeholders and regulators, the importance of an effective contract management process cannot be overstated.”

How AI Can Help Your Firm’s ESG Reporting

Nearly two-thirds of consumers say a business’s environmental and social impact influences their buying decisions. Almost 90% of investors incorporated environmental, social and governance (ESG) considerations into their investing approach last year. Given these statistics, it’s clear ESG policies are a business need.

ESG commitments are sometimes compelled by national and local laws such as the United Kingdom’s Modern Slavery Act or the Foreign Corrupt Practices Act. However, more companies are releasing legally enforceable ESG statements and goals, and 86% of S&P 500 companies already issue regular ESG-related reports. As such, being able to show annual progress across ESG goals is more important than ever.

With companies under increasing scrutiny for their ESG impact, accurate reporting is imperative. Where do you start? Contracts. These legal documents contain essential data points to set baselines, inform reporting and alert you to areas needing improvement. Efficient and effective contract management helps you surface the necessary information.

THE DATA CONTAINED IN CONTRACTS

When you scrutinize contracts, you’re searching for ESG-related data, including:

- » Environmental certifications such as B Corp Certification, Rainforest Alliance and Leadership in Energy and Environmental Design (LEED).
- » Human rights-specific clauses such as anti-trafficking, modern slavery, United Nations Global Compact and an ISO 26000 social responsibility commitment.
- » Audit rights for vendors.
- » Internal policies and codes of conduct like diversity, equity, inclusion and accessibility (DEIA) and ethical charters.
- » Supply chain sustainability measures.
- » Privacy practices, including limiting data collection and use.

This information helps you understand where your organization currently stands regarding your ESG commitments. What areas could be improved? How do existing contracts line up with goals? Do clauses need to be updated or added? From this baseline, you can help set achievable targets.

ONGOING REPORTING AND COMPLIANCE

ESG progress reporting requires consistent monitoring and evaluation. To successfully create an informative and accurate report relevant both internally and externally, you need ongoing visibility into contractual obligations and the ability to manage them at scale. This level of insight is nearly impossible to achieve with manual management.

Manual processes make companies reactionary by only allowing them to interact with contracts at the document level rather than the obligation level, where the relevant data exists. As a result, you can only respond after new regulations or issues arise. Legal professionals spend hundreds of hours manually combing through contracts for specific clauses, time they could spend strategizing how to improve ESG metrics. There's also the possibility a relevant clause or document will be inadvertently missed. The resulting delays and errors could produce fines or additional liabilities.

Reporting does not need to be manual. Artificial intelligence (AI)-powered contract management platforms give you more control over the data. With search capabilities, you can easily surface all relevant information within minutes instead of hours or days, even if the clause has atypical formatting or structure. This technology provides you with historical and current data to track progress.

Generative AI brings new opportunities in ESG management. After training the algorithm on your contract database, you will be able to use it to draft new compliant clauses in your preferred language. You could also use it to customize contracts based on jurisdictions and their requirements and redline based on your client's ESG standards.

ESG REPORTING REQUIREMENTS

Reporting for ESG is far from standardized regarding what information is included and how it is documented.

The European Union already requires ESG reporting, and the parameters are becoming more stringent. The recently approved Corporate Sustainability Reporting Directive (CSRD) expands the reporting requirements and increases the number of organizations that must divulge environmental and social impact information.



Meanwhile, the U.S. Securities and Exchange Commission is poised to increase compulsory ESG reporting this year. Its proposed rules will enhance and standardize climate-related disclosures. New York and California are among a handful of states considering similar laws.

Regulations related to labor and other societal issues are already on the books, including the California Transparency in Supply Chains Act and the Uyghur Forced Labor Prevention Act. Industry-specific legislation also exists, like California's insurance and hospital supplier reporting programs, which requires companies in these sectors to report the amount of business they do with vendors owned by underrepresented groups.

Maintaining compliance will be challenging with so many new and evolving regulations. Manually checking thousands of documents against hundreds of specific requirements is unsustainable. Automation makes the process more efficient and reliable. Technology can flag noncompliant clauses and hidden contract risks so you can quickly remediate them.

As businesses face increasing demands for ESG transparency from stakeholders and regulators, the importance of an effective contract management process cannot be overstated. Contracts contain the information you need to provide tangible proof of ESG efforts. The data helps maintain compliance, inform current policies and drive future strategies, ultimately leading to greater ESG success.

ABOUT THE AUTHOR

Memme Onwudiwe is Executive Vice President of Legal Business and Intelligence at Evisort and a lecturer at Harvard Law School. He helped to build Evisort while in law school at Harvard. Today, hundreds of companies, including Microsoft, Credit Karma and New York Presbyterian Hospital, use Evisort to gain valuable insights into their agreements without tedious manual review. Onwudiwe founded and chaired Harvard's Legal Technology Symposium and currently serves on the advisory board of Innovation Law Club Africa.

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MICHAEL E. BURKE

*Partner
Arnall Golden Gregory LLP*

“Attorneys should be encouraged, and perhaps offered training, to stay aware of their surroundings in any jurisdiction, keep current on local news and avoid spontaneous large public gatherings.”

Protect Your Firm from International Travel Risks

Operating an international firm can be a risky endeavor, especially given the volatile political and security environments in many countries.

But there are several ways to mitigate those risks while still supporting and growing your international operations.

ENSURE PHYSICAL SAFETY IN HIGH-RISK JURISDICTIONS

Attorney travel poses multiple risks to an attorney and their firm. The most obvious risk is to the physical safety of the traveling attorney. In some cases, firms restrict or prohibit travel to high-risk jurisdictions, which are often identified by current news stories. Firms also can link their go/no-go travel decisions to the current set of countries subject to a U.S. Department of State travel warning. Such policies, however, need to be flexible in multiple directions.

Firms and attorneys can take actions to reduce physical risk in high-risk areas. They should also consider requiring certain mitigation efforts that will allow an attorney to travel to such places. At the same time, what should a firm do if, for example, violent protests break out in a location thought to be “safe?”

Attorneys should be encouraged, and perhaps offered training, to stay aware of their surroundings in any jurisdiction, keep current on local news and avoid spontaneous large public gatherings.

CONSIDER IMMIGRATION LAWS AND REGULATIONS

Firms must also consider whether an attorney’s planned activities in a country are consistent with relevant immigration laws and regulations. We’ve all been asked the purpose of our visit when we pass through immigration control. If traveling for vacation, the answer to such a question is apparent. The answer may be less apparent for business development-related travel.

In some jurisdictions, business travel does not require a visa or any other specific approval so long as the lawyer in question is not being paid inside that jurisdiction — this is usually the case with payments of legal fees to U.S.-based firms. Other countries require a visa to enter in connection with any kind of business travel.

It's important for the firm and for the lawyer to get these questions right, not the least because of potential reputational damage.

MINIMIZE THREATS TO INFORMATION TECHNOLOGY SECURITY

Law firm management should be sure to review items an attorney takes on their international trip and clearly discuss the requirements to keep these items under control and secure. Questions to consider are:

- » Is a hotel safe secure enough to store a laptop?
- » Does a laptop's encryption capacity trigger any concerns?
- » What kinds of files should be made available when an attorney accesses a firm's system from abroad?

Travel poses a threat to a firm's information technology resources. A firm's IT security program should block remote access from internet service providers (ISPs) in jurisdictions frequently used by threat actors. ISPs in Ireland, Belgium and the Netherlands are frequently used to launch cyberattacks around the world and are among the most common locations visited by U.S. lawyers. Cutting off a traveling lawyer from remote access isn't a viable solution, so firms should develop a procedure on unblocking certain ISPs.

Management can work with their IT team to unblock ISPs by 1) identifying the specific ISP that the attorney will use, such as in a hotel, and 2) unblocking such ISP for a defined period. Firms can also enable a "kill switch" on attorneys' mobile devices (or download an app that can do so), so information can be erased and access restricted in case the mobile device is lost or stolen. It is important to train attorneys on when and how to use such a kill switch.

UNDERSTAND HEALTH AND PROFESSIONAL LIABILITY INSURANCE COVERAGE

International travel can raise questions related to a firm's health insurance plans, including questions from attorneys who think their plan is effective outside of the United States. Firms need to understand the coverage of the health plans used by their lawyers, and whether such plans offer any coverage or benefit outside of the United States, keeping

in mind that most won't extend coverage past this nation's borders. Because of that limitation, firms might consider supplemental options such as medical evacuation coverage to protect traveling attorneys.

Professional liability insurers take an interest in whether a firm's attorneys venture outside of the United States. Firms are asked each year to identify: 1) the non-U.S. jurisdictions to which they have traveled in the current year, and 2) where they expect to travel in the upcoming year. A firm's attorneys should be required to respond to these surveys.

DISCLOSE INTERNATIONAL BUSINESS DEVELOPMENT TRAVEL WITH OTHER ATTORNEYS

Coordinating international travel, especially business development-related travel, among multiple attorneys can be a manageable challenge. Firms should minimize the potential for attorneys to step on another's toes (or at least contacts) because of uncoordinated travel. Some firms have created location-specific "desks" that are used to monitor and manage business development travel to that area. Other firms take much more of a hands-off approach.

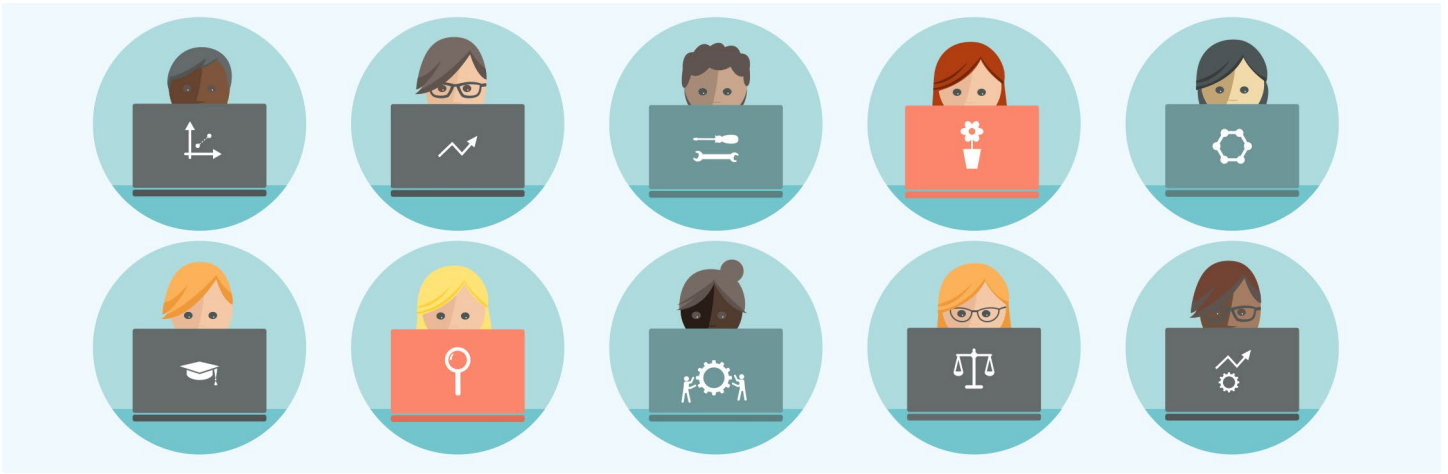
To best leverage international business development travel for the firm, attorneys should disclose upcoming international travel plans. In practice, this kind of notice often prompts other attorneys to suggest contacts and meetings. Post-travel reviews, similarly, are important to gauge the effectiveness of such travel and set relevant follow-up actions and activities.

At the end of the day, firms best serve their attorneys and clients when they effectively and efficiently identify, understand and mitigate the risks associated with a robust international practice.

ABOUT THE AUTHORS

Michael E. Burke is a Partner at Arnall Golden Gregory LLP and administrative partner of the firm's Washington, D.C. office. He co-chairs the firm's international practice and leads the firm's Ireland & Northern Ireland practice, where he advises Irish companies on growth and expansion into the United States. Burke has served as chair of the American Bar Association International Law Section, co-chair of the ABA-United Nations Development Programme's International Legal Resource Center and co-chair of the International Bar Association's Law Firm Management Committee Projects Subcommittee.

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IOANA GOOD AND ADRIEN MAINES
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How Firms Can Assess Behavioral Tendencies to Drive Training and Revenue

Your firm spent \$50,000 sending 20 attorneys to a conference with little new business to justify the investment. Sound familiar? That’s probably because only 5 of the 20 attorneys enjoy networking. Others might be natural closers or great analysts, but this doesn’t mean they like attending social events, public speaking, wining and dining prospects, or bringing in leads.

Law firms often aim to create a culture of business development where client service and revenue generation are top priorities to remain competitive. Attorneys are often financially incentivized to bring in work. Time and resources are committed to networking events, conferences, public relations initiatives and firm retreats — all with the goal of serving as thought leaders, nurturing client relationships and bringing in new clients. Partnership tracks often rely on an attorney’s ability to bring in work; some excel and are promoted early in their careers. Others struggle to find a foothold in a discipline they’re either not cut out for or aren’t adequately trained in.

“The reality is that while the intention is to build a firm where revenue generation is done by many, a great deal of time and money is wasted if people are not in the proper roles or are not provided with the coaching they need,” says Peter Johnson, a former managing partner and Founder of Law Practice Consultants. “[U]sing biodata [helps] inform decision-making surrounding who is best suited to focus on PR, lead generation, creative thinking, analytics to measure success and closing a deal.”

While personality and behavioral assessments have been used for decades, the results traditionally don’t inform clear decision-making about what roles people should be in, what training and coaching they need to become stronger, and which team formations work best to drive dollars and top-line revenue.

“While personality and behavioral assessments have been used for decades, the results traditionally don’t inform clear decision-making about what roles people should be in.”

THE BENCHMARKS

Five behavioral benchmarks have been created using hundreds of individuals who have demonstrated success in varying industries. These five benchmarks — the Media Mogul, Notable Networker, Amazing Analyst, Creative Collaborator and Constant Closer — quickly provide an output report comparing participants' assessments and rating them on a 1 to 10 scale. Firms can create their own custom assessments through a tailored profile that uses the results of firm-selected individuals; every organization has individuals they would clone if they could.

This type of rapid behavioral survey helps firms decide who should attend a conference and speak publicly to large groups of attendees or the press, who is best at creative approaches to bring in business and measure their success, and who should work the final stages to close the deal.

Here is a brief overview of each benchmark.

1. The Media Mogul

Media Moguls are poised, quick on their feet, and enjoy using their expertise to provide insights that help others understand and learn. They display behavioral tendencies that indicate they are not easily distracted and like to finish what they started. They are comfortable in group settings and have high confidence.

2. Constant Closer

The Constant Closer is proactive and gets the deal done. They are competitive, creative and known to motivate others. Closers like to review all the details to ensure they reach the outcome they strive for, often finding an avenue to win business in ways others had not considered.

3. Notable Networker

A Notable Networker enjoys being in groups of people and maintains many relationships with friends and colleagues. They are free-spirited, always up for a new adventure and having fun. Often considered charming and enthusiastic, they value insights from trusted advisers. Notable Networkers are connectors of people who identify and form relationships that solve problems.

4. Amazing Analyst

An Amazing Analyst has a strong sense of duty and is extremely focused on getting the job done. They prefer logic and analysis to emotional decision-making. They



like routine and structure and will step into the limelight to present technical information and findings. They tend to be risk averse, value stability and are willing to explore new ideas or methods, but only if they can be proven with data and analysis.

5. Creative Collaborator

The Creative Collaborator may be cautious when meeting people, but once a relationship is formed, they are extremely supportive. They are charismatic, energetic and social, often telling stories that draw in others. Never one to shy away from a challenge, they like to push boundaries and spark ideas for the sake of improvement. They are original thinkers, resilient, handle stress well and seek out adventure.

Knowing who to send to a conference to generate revenue versus who to rely on to analyze and come up with creative solutions to business problems is critical. Knowing where to invest in training will also help firms succeed. As firms grow, merge and expand in a hybrid environment, this data becomes extremely valuable. It saves time, focuses effort and helps firms go far!




TUNE IN TO *LEGAL MANAGEMENT TALK* FOR MORE ON HARNESSING DATA FOR BUSINESS DEVELOPMENT

Ioana Good, Adrien Maines and Peter Johnson recently joined us on *Legal Management Talk* to discuss how data and benchmarks can help turn your lawyers into rainmakers. Check out the episode at alanet.org/podcasts.

ABOUT THE AUTHORS

Ioana Good and **Adrien Maines** are the Founders of Find A Rainmaker, an online assessment that provides behavioral insights to help companies generate revenue.

 findarainmaker.com



WAYNE TURMEL

Master Trainer and Coach
The Kevin Eikenberry Group

“Engaged workers take a big-picture view of their work, taking the organization, its customers and their fellow workers into account.”

3 Things to Know About Employee Engagement

Employee engagement. We often hear these buzzwords used, and it can be hard to cut through them to reach a working, useful definition. With the rise of remote and hybrid work, how can firms ensure that their employees are both engaged with work and their employers?

First, understand that employee engagement isn't about hanging out after work, foosball tables or cake in the breakroom. One working definition is: "Employee engagement is the degree to which employees invest their cognitive, emotional, and behavioral energies toward positive organizational outcomes." Translate that jargon, and it's how much employees care about the work, their colleagues and the organization, and their willingness to put in discretionary mindshare and effort.

Human resources and other legal managers worry about employee engagement. They are frantically tracking employee satisfaction and other metrics to make sure their employees are "actively engaged" and the results often don't change dramatically.

This isn't to say that firms shouldn't worry about whether their employees are actively engaged at work. Disengaged workers put you at risk for poor productivity, a lack of quality work and employee turnover.

Here are three things you should know about employee engagement:

1. As in romantic relationships, the employee isn't engaged until they say, "yes."

Understand that someone's level of engagement is determined internally. Yes, firms can (and should) do everything they can to create an environment where people choose to connect emotionally and put in discretionary effort. There are factors unique to each worker such as their family situation, personal career goals and emotional state that are outside the control of even the most dedicated leader. When making efforts to better

engage employees, it's important to actually ask them what they want to do better.

2. There are four signs that people are really engaged, and two that they aren't.

Team members are proactive. They seek and offer assistance without being asked. They also volunteer for tasks or learning opportunities because they are self-motivated. They use the words "we" and "us." Engaged workers take a big-picture view of their work, taking the organization, its customers and their fellow workers into account. Less engaged people focus on their own work and tasks, without much regard for others. They also offer their leaders and teammates feedback. Furthermore, even online, people enjoy each other's company and laughter.

Two sure signs that people are disengaged are: a sudden, negative change in behavior (such as people who have always been actively involved in meetings suddenly going into "speak if spoken to" mode) and ... silence.

3. A red flag to watch for is when people say, "everything's fine."

It's no different from when your spouse or friend says, "everything's fine." That should signal you to find out what that means now, or you'll deal with the consequences later. Especially on remote and hybrid teams, it's easy to miss cues that something is wrong until little problems become raging fires. When we are face-to-face and ask someone, "how's it going?" we can see the smile on their face, or the rolling of the eyes or the look of panic as they say, "everything's fine." We'd likely ask follow-up questions to make sure both parties are on the same page.

When people are on the phone or webcam and they say "fine," we might believe them even when things aren't

going well. Avoiding tough topics or refusing to engage in conversation is often a key sign of disengagement.

So, whose job is it to be concerned about engagement?

The fact is, everyone should do what they can to make it so people want to engage with them. When your co-workers care, your job is easier and more pleasant. Leaders don't have to work as hard when they know people are motivated, proactive and positive. As organizations start to plan for or continue remote and hybrid work, if they create an environment where people are rewarded for their efforts, see a future for themselves and do work that matters, there's a pretty good chance people will respond accordingly.

Finally, there's a simple way to find out if people are engaged: Engage with them. Yes, employee surveys help, but so do conversations. Are your coaching conversations merely focused on tasks, or are you having real discussions about not just what people are doing, but how they're doing?

If people throughout the organization discuss engagement, there's a good chance employee engagement will be much, much more than just another buzzword.

ABOUT THE AUTHOR

Wayne Turmel is a master trainer and coach at The Kevin Eikenberry Group. He has spent the last 20+ years fascinated by how people communicate — or don't — at work. His work has helped organizations on four continents develop the communication skills needed to lead people, projects, and teams and to make the adjustment to remote working and virtual teams. Turmel is the author of nine books, including *10 Steps to Successful Virtual Presentations* and *Meet Like You Mean It: A Leader's Guide to Painless and Productive Virtual Meetings*.

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Jacquelyn Ayala (not pictured), an Independent member, is now Director of Personnel at Musick Peeler & Garrett, LLP, in Los Angeles, California.



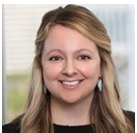
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Nicole Marshall, a member of the New Jersey Chapter, is now Director of Human Resources at Stevens & Lee in Lawrenceville, New Jersey.



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William D. McCall (not pictured), a member of the Philadelphia Chapter, is now Executive Director at Kleinbard LLC in Philadelphia, Pennsylvania.



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Visit alanet.org/volunteers for more information on each volunteer role.

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The Nominating Committee is charged with selecting individuals to fill upcoming vacancies on the International Board of Directors and Chapter Resource Team.

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If event planning is more your thing, we've got three opportunities for you:

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- » **Legal Management Fundamentals Planning Committee**
- » **Intellectual Property Conference for Legal Management Professionals Planning Committee**

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What's Happening at Headquarters

Our Fall Events Have Something for Every Member

Fall means back to school — and that includes your education, too! We've got something for every member this fall, including:

- 

The **Intellectual Property Conference for Legal Management Professionals** is the premier IP-focused forum for administrators working in a legal practice setting. Join open discussions, share ideas and problem-solve with your peers in the intellectual property community this September 21–22 at the Omni Parker House Hotel in Boston, Massachusetts. Member rates start at \$749. Go to alanet.org/ip2023 to register, view the agenda and more!
- 

Executive Leadership Summit takes a deep dive into forward-thinking topics that will explore new approaches and insights to help you deliver tangible results for your firm. Join ALA and other C-Suite level legal management professionals on September 28–30 at the Hilton San Diego Gaslamp Quarter as we spend two days learning from industry experts, gaining leadership skills and practicing valuable next steps. Visit alanet.org/els2023 to register and book your stay.
- 

The **Legal Management Fundamentals Conference** is back for a second year. This is a must-attend program for those in the first five years of their legal management career. Join like-minded peers from across the country for engaging and dynamic sessions led by industry veterans. You'll walk away with invaluable advice and practical tools and skills that you can apply immediately — plus, a new network of colleagues! Mark your calendars now for October 13–14 at the Omni Parker House Hotel in Boston, Massachusetts. Visit alanet.org/lmf2023 for more information.



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to the 2023 Susan L. French Emerging Leaders Fellowship Recipients!

The Foundation of ALA has named **Ericka Brundage**, Legal Assistant Support Manager at Merchant & Gould, PC, and Joanna Hurt, Office Manager at McCarter & English, LLC, the recipients of the Susan L. French Fellowship.

The fellowship program was developed to assist up to two ALA members annually who have a strong desire to enhance their personal and professional leadership skills. The first year of this two-year fellowship program provides a registration and travel stipend to ALA's Chapter Leadership Institute; a personalized series of leadership-focused coaching sessions with Judy Hissong, CLM, a distinguished leadership consultant; as well as other leadership mentoring and course curriculum. Program participants will have an assigned mentor for the first year and will be expected to assume a mentorship role to a future fellowship recipient in the second year of their fellowship.

Thank you to GLJ Benefit Consultants and Affinity Consulting Group for supporting this program!