

# LEGAL MANAGEMENT

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## Best Practices for Adopting Client-Driven Practice Tools

As legal tech continues to rise, how you approach these platforms is more important than ever.





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## A Pandemic Silver Lining: Firms Accelerate Digital Transformation

**The move to remote work in 2020 accelerated digital transformation efforts for many organizations. While it's hard to know whether the office environment will ever be as it was prepandemic, the shift from paper-based processes to using electronic files, online applications and digital workflows is happening faster in legal organizations than ever before.**

Yet many firms remain burdened by massive volumes of physical records in off-site storage, obstructing their efforts to truly go digital. Often accumulated over decades, the records are expensive to store and manage and expose the firm to security, litigation and compliance risks.

For those still struggling to advance their digital transformation, evolving to a more paperless future begins by dealing with that backlog of aging paper records. Many firms began addressing this problem during initial pandemic lockdowns, but now must approach the longer-term issue of dealing with decades' worth of records stored off-site.

It's important to have protocols in place both to deal with old records and to automate workflows for retention and disposition on an ongoing basis to prevent the backlog from growing back.

### ***DIGITIZE OR DESTROY?***

Firms seeking to truly go paperless may be tempted to digitize everything, but digitizing several decades' worth of physical records can be expensive. Before doing so, it's best to determine whether you really need to keep everything. In most cases, you don't.

“  
Rather than postponing the day of reckoning through mass digitization, the best solution for most law firms is to begin dealing with the backlog of records now.”

For some corporate law departments, scanning everything may be a viable solution if their industry requires records be kept for long periods of time. Once records are scanned and the paper copies destroyed, storage costs are significantly reduced. Just make sure the records management (RM) team has a system in place to track the scanned records, preferably with a unified view of all records across all repositories.

On the other hand, law firms with a large volume of physical records, including those several decades old, may find it makes more sense to cull large batches of aging records — most of which will never be looked at again — and scan the rest only on an as-needed basis.

Rather than postponing the day of reckoning through mass digitization, the best solution for most law firms is to begin dealing with the backlog of records now.

## MODERN RECORDS MANAGEMENT

Firms with large volumes of physical records to dispose of may need to conduct the disposition in phases. Modern RM systems enable the quick determination of who the main reviewers are. The older the matter, the less likely the responsible attorney is still with the firm, so limit the review to a group of senior partners who can often confirm quickly that there is no reason to keep records beyond a certain age and give blanket approval for destruction.

With a modern RM system, the entire process is online, making it less cumbersome than with legacy systems. The records manager can trigger a review of files due for disposition, send notifications to the appropriate reviewers and track the status of the review process. Reviewers receive notifications, can see all the files they need to consider in one place and can submit approvals for disposition — or indicate a hold on the files that are not approved. The system automatically logs all activity, leaving no question about who signed off on what and when.

A modern system also makes it easier to break up a large disposition review into a series of smaller reviews for a more manageable workload for the attorneys involved. Rather than conducting disposition reviews for physical records only annually, today's RM systems enable frequent reviews — quarterly or even monthly — which impose less of a burden. By presenting shorter lists of records for disposition more frequently, the process is easier and results in quicker storage cost savings.

Forecasting ongoing costs — for physical records storage usage and destruction fees — and expected savings on future storage helps in planning your approach to disposition. Presenting firm management with a clear picture of costs to destroy a large

volume of files and when those costs will be recouped in the future through savings on off-site storage can help make the business case for eliminating the backlog now.

## PREVENTING ANOTHER BACKLOG

Beyond dealing with a stockpile of paper records is making sure that it does not return.

As more legal documents are signed electronically, the need to circulate printed documents is declining. This reality became clear during pandemic-induced remote work. Now, as some offices reopen, firms are starting to adopt more digital processes on a permanent basis, implementing new applications that enable paperless workflows and phasing out paper wherever possible.

Modern RM systems may provide a dashboard with trend reports indicating just how much paper is still in use across the firm and help to benchmark progress being made in destroying physical records. This is especially helpful, for example, when a new lateral hire joins the firm, bringing client files along with new business. This could easily encompass thousands of boxes that need to be managed and stored by the hiring firm. If the firm's physical footprint is being closely monitored — and if you have a modern information governance (IG) system in place — the issue can be identified and dealt with quickly.

## FOCUS ON THE FUTURE

As legal organizations adapt to more agile ways of working, IG and RM professionals have an opportunity to make permanent changes for the better.

No digital transformation initiative is complete without dealing with physical records. By reducing the costs and risks of allowing records to continue to accumulate unchecked, IG leaders can help their firms operate more efficiently and sustainably, adapt more quickly to future disruptions and position themselves for success.

### ABOUT THE AUTHOR

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**ELLEN ROSENSTIEL CLINTON,**  
SHRM-SCP

*Regional Administrative Manager,  
Kutak Rock LLP  
Chair, ALA's DEIA Committee*

“  
One of the most  
important questions we  
can contemplate about  
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racism exists, but rather  
how can we actively seek  
out all of the ways in  
which it manifests.”

## Becoming an Antiracist Legal Organization

**The more aware I become of just how deeply rooted racism is in our personal and professional lives, the more I begin to wonder how much of an effect any one person, group or organization can have in dismantling this ugly situation.**

Racism is deeply rooted in our country. While it can seem impossible at times, every individual who has some privilege must continue to do this hard work with the hope that we move the proverbial needle in the right direction.

I write this article with a significant amount of inherent privilege: I am a white, heterosexual, cisgender woman who has a higher education and a management position at a national law firm. Even from this viewpoint, I hold no misconceptions on just how difficult a fight this is.

For those in the legal profession, being “not racist” is not enough. Employing the definition by Ibram X. Kendi (author of *How To Be an Antiracist*), we must actively work toward becoming antiracist. To be antiracist, legal organizations must actively develop and support antiracist policies and procedures. It means we actively seek opportunities to dismantle racist policies and practices within our firms, rather than proudly identifying as a nonracist firm.

If we don’t identify as an antiracist firm, we might choose to ignore some of our blind spots. Not acknowledging blind spots, of course, only perpetuates this longstanding issue. Our blind spots are most likely keeping underrepresented groups from being hired, from being compensated fairly or from being promoted, which also increases the likelihood they will leave the firm and the practice (or business) of law altogether.

Law360’s most recent Diversity Snapshot reveals that only 17% of attorneys and about 10% of all partners at surveyed law firms are minorities. Their survey also illustrates

how minority representation fades rather drastically as you go from the population of minority students enrolled in law schools today (38%) to those who are represented in our firms (25%) and, even worse yet, to those who hold equity partnership in our firms.

One of the most important questions we can contemplate about our firms is not *whether* racism exists, but rather how can we actively seek out all of the ways in which it manifests. Firms should be actively looking to see if there are things they can be doing differently to help level the playing field for all employees, with the overall intention of giving everybody a fair chance regardless of their background, gender, race, ethnicity, religion, sexual orientation, age, disability and so on. (For more reading on this, *Blindspot: Hidden Biases of Good People* delves into the biases we carry from our life experiences.)

One simple and yet rather telling measurement firms can take is to compare whether the number of minority lawyers employed in your firm is in line with the growing number of law students of color graduating from law schools today. If it isn't, there is work to be done.

There are quite literally countless ways to seek out the barriers that underrepresented groups experience throughout their employment lifecycle. To act as an antiracist law firm, we must be willing to continually review our organizational systems and interrupt racist ideologies and practices that we've often unconsciously adopted as the norm.

Here are a few areas to get you started.

## RECRUITING AND HIRING

When recruiting new employees, it goes without saying that we want to hire the best person for the job. Is your hiring process fair and consistent? Are you seeking out places where unconscious bias may be influencing your hiring decisions? Is your firm successful in attracting diverse talent? Is your candidate pool representative of your community? If not, consider ways to generate a more diverse candidate pool.

## INCLUSIVE ENVIRONMENT FOR ALL

Inclusion is generally invisible to those who enjoy it. We can measure the level of inclusivity in our firms by distributing a survey measuring inclusion and engagement. As law firm leaders, we must be willing to acknowledge the experiences of those who often feel excluded and then actively work toward addressing these issues. Recognizing that these issues exist is only the first step; it is upon each of us in every gathering to consider who might be on the outside of the normative center and actively work to engage those people and listen to them.



## PROMOTIONS AND ADVANCEMENT

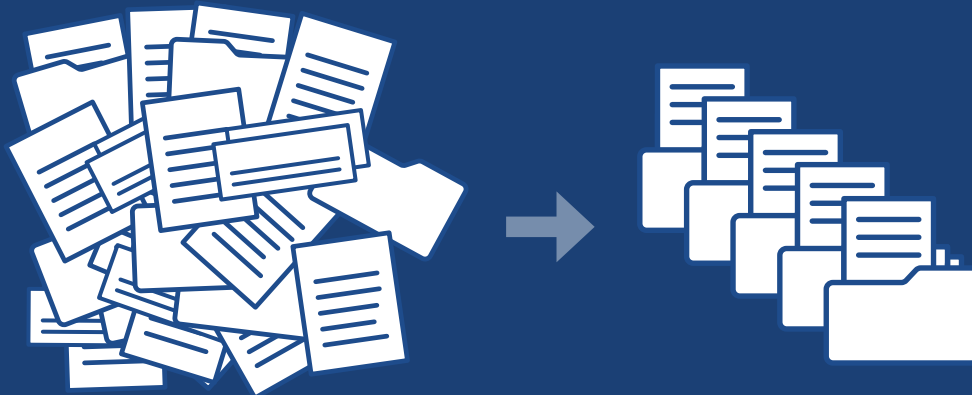
What are the demographics of your leadership teams? Who is getting promoted? If the demographics aren't consistent with your overall workplace demographics, examine why those numbers aren't in alignment.

Legal organizations that truly want to make a difference in this area will continue to actively engage in self-analysis and continually reflect on how they can undo the systemic racism that is so prevalent in our firms and in society. We all share in the responsibility to effect change in the fight for racial justice and to diligently work against systemic racism within our firms, the legal industry and our communities. Please join in this fight.

### ABOUT THE AUTHOR

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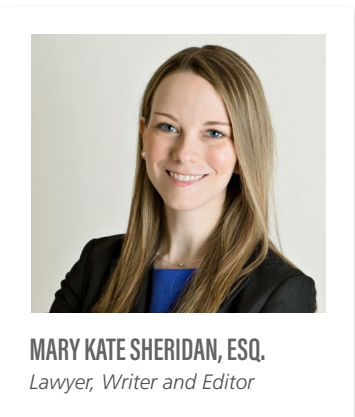
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## 6 Keys to Effective Paralegal Professional Development

*Investing in your paralegals' success is vital to the success of your firm.*

**Paralegals are integral members of their law firms, assisting with everything from legal research to client communications to preparation of briefs and other documents to trials. Providing them with top-notch professional development opportunities is essential for their personal growth and the success of the law firm.**

“Firms should look at it more as an investment than an expense. I know it’s hard because it’s a line item on the budget, but it really is an investment, not just in people but also in serving the clients.”

Robust professional development for paralegals is especially important given the continued impact they will have on the legal industry. According to the U.S. Bureau of Labor Statistics, the projected growth rate for paralegals between 2019 and 2029 is 10% — 6% higher than the average for all occupations.

Nevertheless, training and development resources for paralegals can sometimes be overlooked by law firms.

“Firms should look at it more as an investment than an expense,” says Ann Pearson, Founder of the Paralegal Boot Camp. “I know it’s hard because it’s a line item on the budget, but it really is an investment, not just in people but also in serving the clients.”

Below are six key areas that firms should consider as they develop their paralegal professional development strategy.



## 1. DEFINE THE OBJECTIVE

As with any initiative a law firm pursues, careful planning is important when crafting a professional development program for the firm’s paralegals.

“Define the objective of the mission and make it really clear,” says Pearson. “Make sure it aligns with the overall business strategy of the firm.” She also says a clear objective that ties into the firm’s overall goals will help garner buy-in among firm leadership. Establishing an objective also provides a point of reference as firms assess the success of the initiative.

Hand in hand with defining the firm’s objective is determining which resources best support its goals. If the firm plans to build its own in-house training, for example, it should explore technology options.

“Technology-wise, you want to determine which learning management system is going to best serve the firm’s needs, how the firm is going to develop its training and how paralegals are going to access it,” says Pearson. Some options firms may consider include Kajabi, LearnDash, Ruzuku, Teachable and Thinkific.

## 2. CONNECT WITH PARALEGAL ASSOCIATIONS

While developing in-house resources is one viable option, firms shouldn’t be afraid to look beyond their walls.

“One of the best things you can do for your paralegals is to encourage them — if not sign them up yourself — to join their local paralegal association,” says ALA member Abigail Davis-Hess, CLM, Owner of ADH-Consulting (which offers training on paralegal best practices, among other areas). “Getting them connected to their local paralegal group is giving them a community they can reach out to for support and knowledge.”

## 3. PRIORITIZE TRAINING FOCUS AREAS

Paralegal professional development can run the gamut when it comes to topics. Three areas firms may consider when developing their resources are ethics, communication and project management.



### ETHICS

Understanding ethical obligations is essential when working in the legal industry. “The number one area that should be taught through paralegal professional development programs is ethics,” says Davis-Hess.

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“Having a basic understanding of project management principles and how paralegals can apply those principles to their daily work to make them more efficient may be useful and may help paralegals manage their work better.”

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She also notes a key area that should be covered is ABA Rule 5.3 — that attorneys are responsible for paralegals’ actions and work product. Training should also cover the parameters of the paralegal role, including communications with clients and others, disclosure of one’s status as a paralegal, and the types of duties one can and cannot perform. Paralegals should be fully trained on the unauthorized practice of law to ensure they remain in compliance.



### COMMUNICATION

Another vital area for paralegal professional development is communication. “Paralegals handle a great deal of the communication in and out of a law firm on a daily basis,” says Davis-Hess.

Communication skills are vital in terms of client service and firm best practices. Ensuring that the firm has a solid approach to communication and that paralegals are trained on this approach is essential.

“Writing skills are really important,” Pearson says. Firms must train paralegals on how to conduct themselves when representing the firm, including how to communicate with clients and outside vendors, she says.



### PROJECT MANAGEMENT

Paralegals may also benefit from professional development focused on project management.

“Having a basic understanding of project management principles and how paralegals can apply those principles to their daily work to make them more efficient may be useful and may help paralegals manage their work better,” says Pearson.

If project management is part of your firm’s best practices, providing paralegals with an overview is important so they can understand the approach, including its impact on workflows and productivity, and method used (e.g., waterfall vs. agile).

## 4. PROVIDE MENTORING

A valuable component to any professional development offering is mentoring, which yields more satisfied employees. Indeed, according to the CNBC/SurveyMonkey Workplace Happiness Survey, more than 90% of respondents who have a mentor are satisfied with their jobs — and more than half are “very satisfied.”

Davis-Hess recommends that firms provide either a paralegal or attorney mentor for each paralegal at the firm. “You want them to understand the ins and outs and why,” she says. A mentor can be a useful resource for everyday inquiries, substantive questions and career advice.

## 5. INCENTIVIZE PARTICIPATION

Despite best efforts, attracting participation in professional development programs isn’t always easy. Pearson recommends that firms offer incentives for paralegals to participate. For example, firms may provide billable-hour credit for attending certain training sessions and events. They may also offer credit for time spent teaching.

Another approach is to create a tier system, an approach Pearson has seen succeed at one of her client firms. Through a tier system, the firm establishes multiple seniority levels that include increases in salary and bonuses. To progress to the next level, paralegals must meet several criteria, including professional development goals. “It really gives paralegals an incentive and makes them feel they are truly advancing their career,” she says.

## 6. CONSIDER GENERATIONAL SHIFTS

In formulating the ideal professional development model for your firm’s paralegals, it is imperative to focus on the audience, including the newest generation of paralegals from Gen Z.

“Beyond the pandemic, I think the biggest shift or trend that we’re seeing is the need for training that’s going to fit better with the new generation of employees that are already working at the firms,” says Pearson.

For starters, firms should embrace video training. A study by the learning company Pearson — unrelated to Ann Pearson, the paralegal trainer — revealed that Gen Z’s learning method of choice is YouTube. According to the survey, more than 50% of respondents “say YouTube has contributed to their education, learning, and/or personal development in the past 12 months.”

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“Beyond the pandemic, I think the biggest shift or trend that we’re seeing is the need for training that’s going to fit better with the new generation of employees that are already working at the firms.”

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Firms should be attuned to the length of video training. “All of the advice has been to start making shorter videos,” says Ann Pearson. Firms may consider breaking a training into multiple shorter videos rather than one long one.

In addition to their attachment to videos, Gen Z also values their independence. A recent LinkedIn survey found that “nearly half of Gen Z respondents prefer a fully self-directed and independent approach to learning.”

As firms plan their approach, they may opt for an in-house video library, which gives paralegals freedom in planning their training.

“Create a video library on subjects like ethics, communications, best practices for your firm, etc.,” says Davis-Hess. “Law firms are busy places, so if you create the resources, paralegals can engage with the trainings when they need them, according to their own schedules and development.”

With clear planning and objectives, your firm can create the ideal professional development initiative for your paralegals. Crafting a solid professional development strategy will not only benefit paralegals’ growth but also bolster your firm.

### ABOUT THE AUTHOR

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“Many platforms tend to come with lots of bells and whistles built in that the client does not bother with, so getting hyper-focused on how they use the tool will help save you and your team time and energy.”

## Best Practices for Adopting Client-Driven Practice Tools

*As legal tech continues to rise, how you approach these platforms is more important than ever.*

**More and more corporate clients are asking law firms to partner with them in using project management tools and other platforms to streamline their work together. For many administrators, this means not only learning how to use these platforms themselves but also coming up with ways to effectively train lawyers and staff on them.**

With the adoption of legal tech on the rise and no sign of it slowing down, it will be key for both firms and administrators to be intentional about how they approach their training and use of joint platforms with their clients.

Here are a few key things to consider as you go about working with clients and your teams on how to successfully adopt new tools.

### 1. Understand how the client expects you to use them.

Like many things, a good place to start is with understanding expectations. If your client has asked you to use one of their preferred platforms, begin by asking them for some specific direction on how they use (and would like you to use) the platform.

Many platforms tend to come with lots of bells and whistles built in that the client does not bother with, so getting hyper-focused on how they use the tool will help save you and your team time and energy.

“Project management platforms tend to have highly customizable project configurations, so it’s helpful to get a sense of each client’s unique setup,” says Gillian Fishman, the Founder of Jade, a startup dedicated to driving technology adoption in the legal industry.

If you are sensitive to asking your client for their time and help, remember to structure your request from the perspective of “what’s in it for them.” In other words, the more you demonstrate how their efforts to inform you will help your firm meet their expectations, the more likely they are to accommodate your requests.

## 2. Don’t reinvent the wheel if you don’t have to — contact the platform provider and ask them to help train your team.

Instead of taking it upon yourself to design a training system and conduct sessions for your team, consider reaching out to the platform provider first to ask them to provide sessions to train your staff.

Most providers are happy to set up group training sessions for several reasons. First, there has been an explosion of project management tools in the last few years, and with increased competition, many providers are more than happy to provide training that sets them apart. Second, training means they have an opportunity to help make their tool successful inside your organization — in hopes that their product will stick around.

As part of our request, remember to mention to the provider that you’ll be sure to tell the point of contact at your client (who is also their client) that they were accommodating and helpful in the adoption process.

If you are unable to secure training directly from the platform, consider whether it makes sense to hire an outside consultant to host the training for you. The value here, of course, lies in the subject matter expertise that training consultants, training platforms and their methodologies bring to the table.

## 3. Train in context.

“The most effective way to learn a new technology is to learn it in context,” says Fishman. “Diving in with a specific goal in mind and working through how to accomplish it is much more productive than clicking around without an objective or watching someone else perform generic tasks in a tutorial or training session.”

In other words, use the information you learn from your client about their priorities and how they use the platform to train with specific examples and to keep the training as narrowly focused as possible. Providing access to the platform and asking your team to “poke around” can quickly leave them feeling overwhelmed, particularly with multi-use platforms that have multiple applications.

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“Remember to break up training into smaller chunks to allow your team to process and digest the ins and outs of the new platform. The science behind smaller sessions — like 30 to 45 minutes, for example — suggests they’re better for retention.”

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## 4. Provide a roadmap, to the best of your ability, and break the training up into small chunks.

If you are going to be tasked with training the team yourself, remember to take some time up front to build a simple roadmap that the training will follow. A formulaic approach combined with a simple outline goes a long way in giving learners comfort about the process.

For example, break your training sessions into four to five parts with well-defined objectives instead of unstructured, marathon training sessions.

If you’re concerned about the return you will receive from spending your valuable time outlining the training sessions, remember that this is not all or nothing. In other words, even a small investment of your time spent designing a simple roadmap will make a difference with how the training lands with your team.

Similarly, here’s another concept you’ve probably heard before but that bears repeating here: Remember to break up training into smaller chunks to allow your team to process and digest the ins and outs of the new platform.

The science behind smaller sessions — like 30 to 45 minutes, for example — suggests they’re better for retention. Even when you have buy-in from your team, “changing someone’s routine is hard — and the bigger the change, the harder it is to make,” says Fishman. “So keep each step toward the end goal small — a small change that takes a small amount of time (and a small amount of thinking).”

## 5. Focus on small wins.

When it comes to learning new technologies, small wins are key.

“A great software training program is one that keeps users engaged and motivated, and the key to user engagement and motivation is incorporating interactive elements early and often,” says Fishman. “The earlier and more frequently you

can give a user a small win — accomplishing something with the software successfully — the more likely you are to hold their attention and maintain motivation.”

A small win could be, for example, acknowledging someone on your team (such as in a team meeting) for successfully completing their first client-facing use of the platform. Another could be a short email after a training session acknowledging them for taking the time to show up at a training given their already busy schedule.

As an administrator, don't forget to acknowledge your *own* small wins as you learn the platform yourself and help your team do the same.

## 6. Start building protocols and setting expectations with your team members — legal tech is here to stay.

As legal technology platforms become more and more commonplace, there's no doubt that clients will expect you and your team to work with them through their preferred software.

As a result, consider whether it makes sense for you to build out some simple protocols for the adoption and use of client platforms. Here's a simple starting point: The next time you're asked by a client to work with them on a new platform, document all of the steps you took in working with the client and your team to get it up and running. Take notes and make a list of what you did with the client, how you approached the platform provider, how you rolled it out with your team, how you structured the training and so on. Taking just a few minutes here and there to record and memorialize how you went about it will make doing it the second time that much easier.

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“As an administrator, don't forget to acknowledge your *own* small wins as you learn the platform yourself and help your team do the same.”

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Also consider the value that may come from setting expectations for your team by making it clear that more and more clients are likely to reach out and ask the firm to partner with them moving forward. Prepare them for what's to come.

“Getting buy-in from the people who will be using the software is just as important as getting buy-in from the decision makers,” says Fishman. “And for legal professionals, buy-in requires generating excitement about the reward, proving the risks are minimal and proving it will make a difference to their clients or company.”

Where applicable, don't forget to highlight that a new software — though it may be tedious or challenging to have to learn how to use it — will lead to increased efficiency and potentially less work for your team in the long run.

### ABOUT THE AUTHOR

**Drew Amoroso** is an Attorney, Public Speaker and Founder of DueCourse, a mobile application that helps professionals strengthen their workday mindset and show up at their best at work.

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**PHILLIP M. PERRY**  
Freelance Business Writer

“Developing appropriate workplace policies can be especially challenging for law firms located in multiple states, with each having a different set of regulations regarding the medical or recreational use of marijuana.”

## Weed in the Workplace

*Legal organizations grapple with evolving marijuana regulations and growing social acceptance of recreational use.*

**As more states legalize marijuana, law firms face a growing risk of performance impairment by staff members using the drug for medical and recreational reasons.**

When developing workplace policies, legal managers must answer critical questions, including the following: When should drug tests be administered, if at all? Should employees be penalized if their blood tests indicate high levels of THC (tetrahydrocannabinol), the principal psychoactive constituent of cannabis? For individuals who require marijuana for medical purposes, must accommodations be made under the federal Americans with Disabilities Act or state human rights laws?

Such questions are bound move to the front burner as society becomes more cannabis tolerant. Thirty states and Washington, D.C., have either legalized or decriminalized recreational cannabis use, and about 24 million Americans were current marijuana users, according to the 2016 National Survey on Drug Use and Health.

So it's increasingly likely that your employees could be off-duty cannabis users. Additionally, managers may wonder about on-duty impairment or even usage. "Every indicator points to a continued increase in the use of marijuana in the workplace," says Amy Ronshausen of the Drug Free America Foundation.

### STATE LAWS

The patchwork nature of cannabis law complicates matters. "Developing appropriate workplace policies can be especially challenging for law firms located in multiple states, with each having a different set of regulations regarding the medical or recreational



use of marijuana,” says Justin M. Brandt, Partner at Bianchi & Brandt. Nearly all the legal services of his Scottsdale, Arizona, firm involve cannabis licensing or related business operations.

Drug testing policies, Brandt emphasizes, must comply with each jurisdiction’s regulations. Arizona, for example, allows both medical and recreational use of marijuana, so employees enjoy some limited rights they might lack elsewhere.

“Medical marijuana card holders in Arizona cannot be punished for positive THC tests unless they’ve used or possessed cannabis on the premises or if there’s evidence of impairment by marijuana during working hours,” he says. “Demonstrative evidence of impairment might be erratic behavior, slurring of words, uncontrolled laughter or an odor of marijuana that suggests individuals smoked a joint during lunch break.”

Employers at one time could fall back on a general appeal to the federal ban on marijuana, figuring it trumps state law — but no longer. “The fact that marijuana use is federally illegal, as a criminal matter, does not mean that states cannot legislate employment status,” says Faye Caldwell, Managing Partner of Caldwell Everson PLLC, a Houston, Texas-based employment law firm specializing in workplace drug testing. “Employment is generally a state matter.”

Unlike many areas of the legal terrain, case law offers little clarification. “Because the marijuana laws are so new, there is not a lot of fill-in detail that might come from a history of court cases or other regulatory action,” Caldwell says.

## POLICY DECISIONS

If marijuana law presents law firms with something of a moving target, one approach is to place the topic under a larger umbrella.

“We do not have specific policies regarding the use of cannabis,” says Tiffany Ho, Director of Operations for Rogoway Law Group, a three-office California firm active in cannabis regulatory compliance. “It would be included under the substance abuse and standards of conduct provisions of our employee handbook. If any illegal drugs or alcohol are brought onto the premises, we would take appropriate action such as a sit-down meeting, a written warning, up to and including termination if appropriate.”

As those comments suggest, employers may still outlaw on-site use of marijuana. “In states where marijuana is legal, you can still ban its use in the workplace, just as you can with alcohol,” says Joe Reilly, President of his own drug testing consulting

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“Because the marijuana laws are so new, there is not a lot of fill-in detail that might come from a history of court cases or other regulatory action.”

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firm in Melbourne, Florida. “Nothing in the statute prevents an employer from maintaining a drug-free workplace, whether for medical or recreational purposes.”

That sounds good on the surface, but the packaging of marijuana in new forms complicates matters. “We are not just talking about a joint, which would be easy to see and smell,” says Ronshausen. “We also have products like granola bars, soda and candy that contain marijuana. Without actually looking at the packaging, how would you know employees are using the drug?”

## CBD ISSUES

If marijuana in smokable or ingestible form has been getting the lion’s share of attention from employers, a related substance named cannabidiol, popularly known as CBD, can raise its own problems. This extract from the marijuana plant is ingested for health reasons and is not considered a controlled substance if it contains less than 0.3% — three-tenths of 1%, not 3% — of THC.

While that sounds like a straightforward guideline, the lack of CBD regulation complicates things. “The CBD that people are ingesting may have higher levels of THC than 0.3%,” says Donna R. Smith, PhD, Regulatory Compliance Officer in the Tampa Bay, Florida, office of WorkforceQA, a nationwide third-party administrator of drug-free workplace programs. “Additionally, employees may be using a larger quantity of CBD than normal. In either case, the employee’s drug test may detect THC above the cutoff level for a positive test.”



Making the drug test picture still murkier is the fact that THC levels, unlike alcohol, can remain detected in the body for extended periods of time — sometimes up to 30 days. As a result, it is often difficult to show a linkage between a positive THC test and employee workplace behavior. “A person who uses marijuana on Saturday will likely have no psychoactive effect a few days later,” says Brandt. “So a positive drug test on Monday does not necessarily mean they were impaired while on the job.”

Unlike the situation with alcohol, there is no consensus as to the level of THC that signifies impairment. Further, the different methods of ingestion can result in blood test variances. “While smoking marijuana can result in a quick spike in THC blood levels, that is not the case for other methods of ingestion,” says Caldwell. “While ingesting marijuana as an edible, some people might appear very impaired, but their blood levels of THC might never climb very high.”

## STAFF COMMUNICATION

Given the drawbacks of testing, there is no foolproof way of knowing whether an employee is impaired by marijuana use. “I encourage my clients to train supervisors to spot behavior that is characteristic of impairment, and to have policies that call for specific steps to take,” says Caldwell.

Whatever workplace policies law firms adopt, staff communication is critical. “I like a lot of transparency on this topic,” says Caldwell. “Employers need to inform the staff of the relevant policies and whether they call of accommodation. And people need to be told they cannot come to work impaired and they cannot use marijuana in the workplace.”

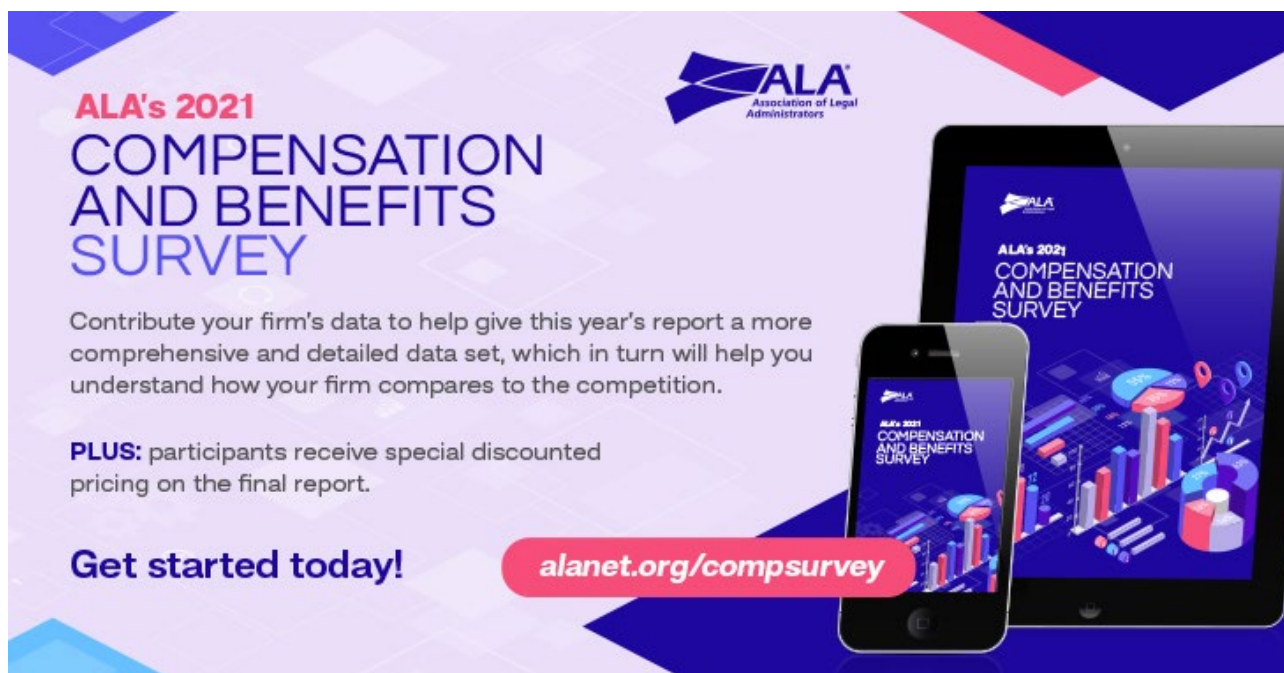
While the solution to the cannabis policy puzzle is far from clear, it’s apparent that the policies adopted by a law firm will to a large extent reflect its core principles.

Rogoway Law Group offers a case in point. “We want to ensure all our workplace policies support our larger mission, which is pursuing good through excellent lawyering,” says Ho. “Our work environment is designed to support that mission, and our employees are provided with the resources and support they need to thrive and to be the best version of themselves.”

### ABOUT THE AUTHOR

**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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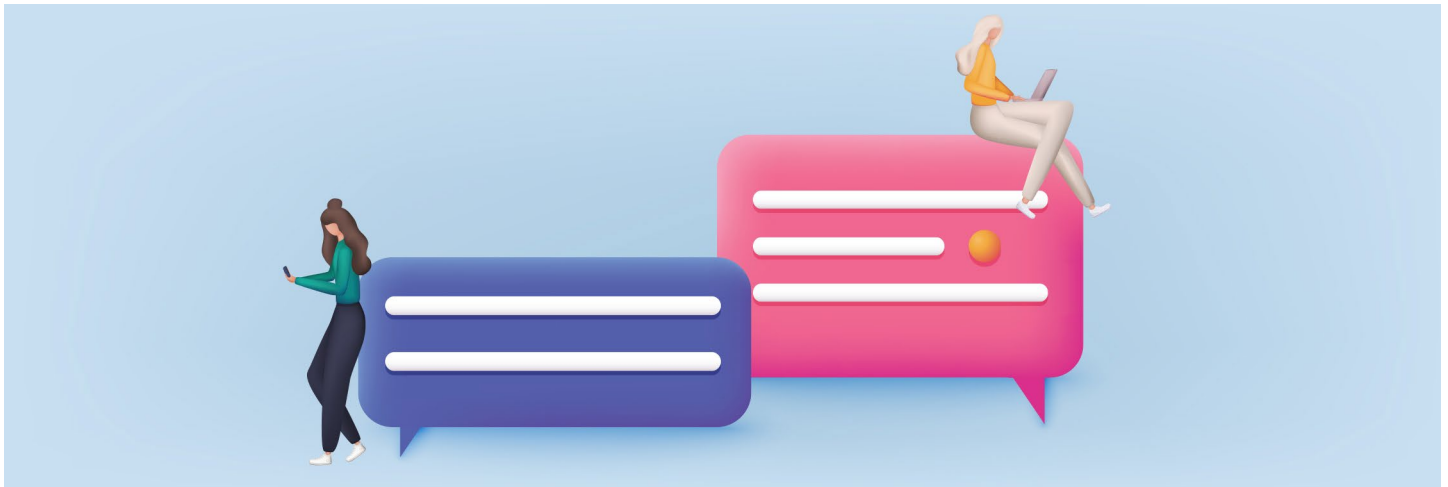
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**WENDY J. MEYEROFF**

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“  
There’s another issue  
beyond education: Is  
English your audience’s  
native language? Reading  
complex materials can  
be very difficult for even  
the well-educated when  
English is their second  
language.”

## How to Use Plain Language to Communicate Clearly

**OK, be honest with yourself. You’re a smart soul, but how easily can you translate this phrase into plain English: “gastrointestinal dyspepsia”?**

Now, now — no cheating. Don’t copy and paste it into Google search. I’m about to translate it for you, just as I do when I teach classes in understanding and using plain language.

In class, my next step is telling the students about a medical writing class I took years ago. Our teacher “translated” that intro phrase to “acid reflux.”

“Oh!” you’re probably screaming. “That’s understandable.”

Like you, everyone was practically applauding the teacher’s insight. But that’s because the students were either health professionals or well-educated folks providing health or science communications. I’m the latter, and I’d already been in my field for a decade when I took this class. I caught the teacher after class and said:

“I loved this, but I am concerned with the message that ‘acid reflux’ is the simplest translation for gastrointestinal dyspepsia.”

“It is.”

“Well, no. What’s wrong with ‘heartburn’?”

Stunned silence ... and then he admitted he’d have to add that the next time he taught.

## IT STARTS WITH EDUCATION AND LANGUAGE SKILLS

What you just read is one of the key issues when it comes to translating complex or specialized content into plain language in *any* industry: Who is your audience, and what is their educational level? Are you writing marketing — or other materials — that's going to upper-echelon management types, or at least all college graduates? Then your words can be at about a 10th-grade level — sophisticated, but not too academic-sounding.

But what if you're mostly addressing people you know are only likely to be reading at a sixth-grade level? We used to say that's the level for most website content; now some even suggest fourth grade. Wouldn't heartburn then be more feasible?

There's another issue beyond education: Is English your audience's native language? Reading complex materials can be very difficult for even the well-educated when English is their second language.

I see so many places where legal documents must be provided in Spanish, French, Chinese (and/or other Asian languages), Russian — the list goes on. When a different language is needed, remember that even simpler English phrasing is, too.

## IT'S FOR LEGAL ... AND FAR MORE

What if your work includes corporate communications, and you have to explain the employee website for reporting issues like sexual harassment? That's not so much a legal issue as a tech one, because it means you and perhaps the IT and/or HR folks have to be sure a user manual is easily understandable — especially if you'd like to reduce the need for in-house IT folks or external help calls.

Same for health issues. Any time your firm can make health care information easier to understand, the fewer challenges you'll face. Successfully using plain language can cut down on feedback like "I thought I had benefits for XXXX!"

Then of course, there's traditional legal lingo. Why must a contract include words like "wherefore," which seems to have been used in almost every legal doc since the beginning of time? Does the legal world have something against the word "why"?

## SAVING PAPER

I must admit that I have not seen a scientific study on how much plain language reduces pages. But I'll bet that study could be done.

I recently got a contract that was eight pages long. It was written with lots of "wherefores" and "party of the first part" lingo. I actually got to a section where two segments were all in caps. The first segment ultimately related to ABC company's legal responsibilities; the second noted which were mine.

Well, I asterisked that first segment and added something like this: "Since ABC company owns the entire document upon its final approval, it is legally responsible for its use from then on, especially if it makes any changes without Meyeroff's approval."

That's it. That's basically how I translated it. (And the client accepted it.) Any real reason that couldn't be the type of phrasing not only regarding ownership, but any contract pointers? Far less paper!

## YOU CAN GET OTHERS ON BOARD

If you're worried that your hierarchy would find such translations legally dangerous, you're not alone. So I leave you with this dialogue, which is essentially what I heard at yet another writers' conference.

The National Institutes of Health was teaching the benefits of communicating any clinical material — whether on a PowerPoint slide or in a journal article — with storytelling. The presenters showed and stressed plain language. In the Q&A, this arose:

"Well, this is great, but I don't think our legal department would let us do it this way."

Heads nodded.

Answer: "Well, ask them how many lawsuits they think they'd have if people could no longer say they hadn't understood the company's directions or their personal responsibilities."

Sometimes keeping it simple really is the best, clearest form of communication.

### ABOUT THE AUTHOR

**Wendy Meyeroff** has been a leader in "Turning the Complex into the Comprehensible®" for more than 20 years. She works with B2B and B2C print and online materials for clients in health, tech, legal, engineering and more.

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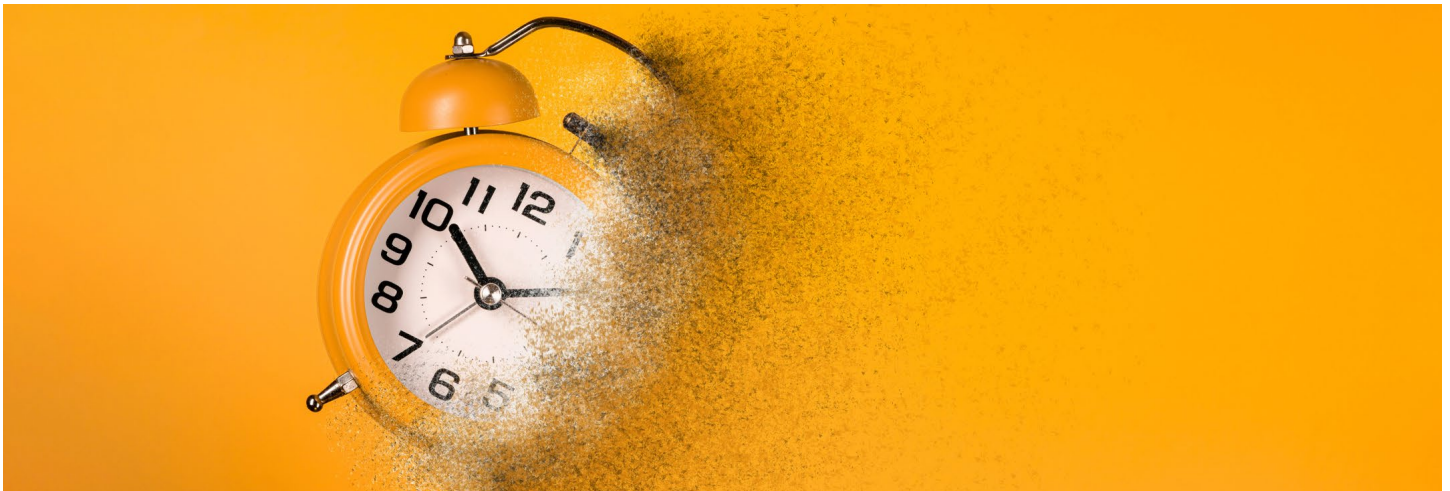
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## Why Poor Timekeeping Could Be Costing Your Firm (And How to Fix It)

Most law firms live and die by the billable hour. But if time is money, why does tracking it tend to be an afterthought in so many firms? The lack of a comprehensive and consistent timekeeping system may be hurting your bottom line more than you realize.

If you're not watching your money, you're probably losing money. And in a post-COVID-19 world with more attorneys and clients working and interacting remotely, timekeeping is more critical now than ever before.

### WHY TIMEKEEPING IS IMPORTANT (BEYOND THE OBVIOUS)

OK, so we all know the straightforward reason why good timekeeping is critical for a lawyer (or any professional) who bills by the hour: it's how revenue is generated. However, there are additional benefits to instilling a good timekeeping culture that law firms can't ignore.

- » **Accurate timekeeping is a matter of professional ethics:** The American Bar Association's Model Rule 1.5 lays out the guidelines for fees in a lawyer-client relationship, which includes proper consideration of "the time and labor required" for a matter. Detailed and systematic time recording is a way of abiding by this rule.
- » **A comprehensive record of time creates an audit trail you can rely on in the event of questions or discrepancies:** Whereas block billing ("3 hours spent on discovery") doesn't inspire much confidence in the client, a more granular approach ("1 hour spent researching legal precedents, 15 minutes spent responding to email from opposing counsel") makes it easier for clients to understand the breakdown of costs and how it reflects the work performed.

“When time is tracked accurately and properly, it reinforces ethical transparency in your billing that benefits both the firm and its clients.”

» **Good timekeeping practices guide your firm’s strategy and business decisions by revealing the profitability and efficiencies of specific practice areas:** Even if it’s nonbillable time, or if your entire practice is centered on fixed-fee billing, accurately capturing the time firm employees spend working on a matter provides valuable insights into the different types of matters, clients and practice areas that your firm handles.

When time is tracked accurately and properly, it reinforces ethical transparency in your billing that benefits both the firm and its clients. Clients are less likely to pick apart a detailed invoice and dispute how much time certain activities took, especially compared to a traditionally vague “block billing” approach. And with fewer hours slipping through the cracks, you’ll likely increase the amount that you bill — and ultimately collect.

But how can you instill a better timekeeping culture within your firm?

## PRACTICAL TIPS TO IMPROVE YOUR FIRM’S TIMEKEEPING PRACTICES

Of course, securing buy-in from attorneys and staff won’t happen overnight. It’s essential to frame the change as an opportunity to improve the practice and increase revenue, not a bureaucratic policy that will make their lives harder — because when you implement the right system properly, their lives will only get easier.

Here are a few tips to help your firm transition to a sound timekeeping practice:



**Timeliness:** At a minimum, firm employees should be tracking their time daily, if not more frequently throughout the day. Don’t wait weeks or months to record hours. Waiting until the end of the day to record your time can cost you 10%–15% of your

potential billable hours due to inaccuracies caused by trying to remember time spent on each activity. Waiting 24 hours can lose you about 25% of your time, and recording time weekly can result in about a 50% loss of your billable time (and a questionable guesstimate for your clients). How can this have such a large impact? If you under-record your time, no client will complain — time spent on a matter that is not captured is just lost revenue for the firm, not them. If you overestimate the time spent, clients will notice, and you may end up having to write down your hours to keep them happy. Your firm loses both ways.



**Ownership:** The most accurate time is the time you record yourself. After all, who knows better how you spend it than you? It’s important to instill an ownership culture in the firm when it comes to timekeeping.

Don’t just pass off your time recording to someone else. Again, billing isn’t just a financial issue. Attorneys can’t delegate ethical responsibility to others and not be accountable for their work, so is it really worth taking that risk?



**Tools:** Implementing a timekeeping system or billing software is a must for tracking time correctly. A simple, intuitive interface will increase adoption. You might be surprised at the number of firms where attorneys are still recording time manually

and then handing it off to a paralegal or assistant, in some cases as infrequently as weekly or monthly! Ultimately, investing in a reliable timekeeping platform is investing in your firm and its client relationships.

## DEVELOP A SUPPORTIVE, NOT PUNITIVE, CULTURE AROUND BILLING

Some accounting firms lock employees out of their system if their time isn’t logged by Monday mornings! As with most initiatives, forcing new protocol upon employees with little to no input or context is rarely successful. So how can you foster a culture of good timekeeping without becoming a billing overlord?





Promoting self-ownership of timekeeping, instead of a top-down dictatorial approach, is a significant piece of the puzzle. Particularly when it comes to nonbillable or “administrative” tasks like time tracking, busy lawyers will almost always take the path of least resistance. Therefore, you should make it as easy as possible for employees to track their time.

If you’re employing the right tools, timekeeping should be an easy part of the workflow, not a dreaded chore. A platform that can help you track time (and even prompt you on how to allocate it upon entering) removes a substantial administrative burden, especially compared to tracking on paper or in a spreadsheet and then adding up hours after the fact.

Ideally, your timekeeping system should also be used to streamline the prebill review and invoicing process. Housing both of these processes within one platform streamlines the front end and back end of the process, making billing as a whole more efficient, ethical and effective.

Accurate timekeeping is the lifeblood of any law firm, yet many aren’t following simple practices that would make it much easier and accurate. At a time when every scrap of incoming revenue is needed, cleaning up a firm’s approach to timekeeping can go a long way to improving the bottom line.

ABOUT THE AUTHOR

Scott Brennan is Chief Executive Officer and Tom Boster is Chief Financial Officer/Chief Operating Officer of Lexicon, a provider of practice management software and legal support services in one integrated platform. This includes a full suite of videoconferencing support for law firms and lawyers, as well as training.

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**CHRISTINA FLOYD AND  
KAREN LEASTMAN**  
*First American Legal Finance*

# A Fresh Look at Leasing: How and Why Today's Legal Executives Use Financing for Their Firm

Given the evolving economic climate and rapid pace of digital transformation, financing new office equipment, technology or software can offer more strategic benefits than ever. These benefits can help legal executives position their firms for success.

Below we explore some of the key strategies and latest stories behind why law firms are turning to leasing in 2021.

## MANAGE IT INVESTMENTS

In today's environment, firms are reprioritizing their IT budget for the years ahead. Firms' technology spend tends to include a variety of equipment ranging from laptops, desktops, telecom systems, copiers, servers, and more. Whether migrating from a desktop to laptop model or implementing a cloud-based infrastructure, you can combine IT hardware and services into one recurring expense through leasing.

At the onset of the pandemic, an Am Law 100 firm began shifting their IT model to support employees working remotely. The firm was migrating from desktops to laptops and sought out a seamless solution. A fair market value lease provided them with a built-in refresh cycle to protect against obsolescence and included data wiping services for when it is time to return the equipment.

### Key strategies:

- » Create budget predictability.
- » Implement a built-in refresh cycle.
- » Avoid technology obsolescence and IT maintenance.

“Whether firms are investing in lateral hires, training programs, future build-out projects, or wanting to maximize tax benefits, leasing is a way to help achieve their financial goals.”

## ALIGN FINANCIAL STRATEGIES

Making long-term growth investments is critical to keep pace with the evolving and competitive legal landscape. Whether firms are investing in lateral hires, training programs, future build-out projects, or wanting to maximize tax benefits, leasing is a way to help achieve their financial goals.

A California-based law firm needed to move their headquarters office to accommodate growth. The relocation required a significant investment in furniture, technology and other leasehold improvements that went beyond the tenant allowance. Although the firm had a strong cash position, finding a solution to maximize their tax strategy was a top priority. Utilizing a lease structure allowed the firm to expense their rental payments and align the cost of the project to the partners' tax benefits.

### Key strategies:

- » Expense lease payments.
- » Use cash for other initiatives.
- » Align tax benefits for partners.

## FINANCE SHORT-TERM PROJECTS

As law firms are migrating to cloud-based solutions, consulting fees, annual subscriptions and maintenance agreements are growing expenses in technology budgets. A short-term financing arrangement spreads out these costs, leading to better predictability and stronger cash flow management.

An Am Law 50 firm was in the process of renewing their multimillion-dollar Microsoft license agreement. While the firm typically paid cash for their renewal, they were interested in considering alternatives to better align the upfront cost of the project to the use of the software — similar to how they would budget for their utility expenses. The firm opted to finance through a 12-month lease, allowing them to spread out the cost into a monthly expense.

### Key strategies:

- » Preserve cash.
- » Customize term lengths.
- » Spread out annual costs.

## LOOKING AHEAD

To thrive in the post-pandemic environment, law firms should consider alternative funding sources that offer more benefits than utilizing cash alone. Financing your upcoming technology refresh, annual subscription renewal or software upgrade can help position your firm to achieve greater financial success now and into the future.

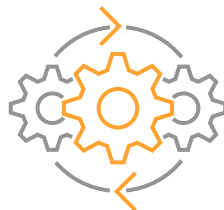
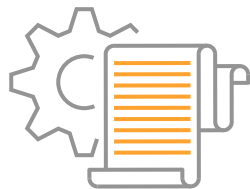
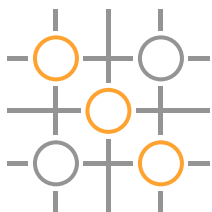
### ABOUT THE AUTHORS

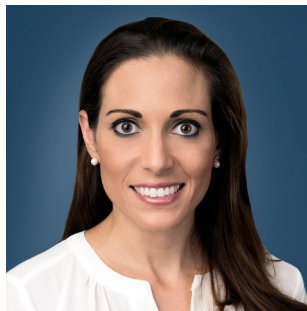
**Christina Floyd** is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully completed the Legal Management Finance Specialist Certificate Program through ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 200 firms.

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**Karen Leastman** has more than a decade of equipment leasing knowledge and dedicated experience working with the law firm industry. Since joining First American in 2003, she has been a key contributor in building First American's law firm division which now serves more than 200 law firms across the United States, including Am Law 100 and 200 firms. As a Certified Lease and Finance Professional (CLFP), Leastman is a leader in the equipment leasing industry.

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**LAUREN SMITH**  
Principal, National Partner Group  
Parker + Lynch Legal

“  
At the core of a  
successful career are  
good relationships, and  
making a positive, lasting  
impression is sure to help  
you nurture relationships  
that will last.”

## Progressing Your Career: Best Practices for Associates

Even in the face of the COVID-19 pandemic, the demand for legal services has not slowed, and many firms are finding themselves with a tremendous need for the right talent to grow and sustain their businesses. This presents an opportunity for current associates to fulfill their employer’s needs, prove their value and, ultimately, kick their careers into hyperdrive.

Some associates may have spent the past year feeling isolated, faced with mounting pressure to prove themselves while working remotely. But these challenges do not have to serve as roadblocks to one’s career progression. While many remain free from daily commutes and other obligations, now is an opportune time for associates to think strategically about the long term and what direction they’d like to take their career. Through my years of experience within the industry — serving as a commercial litigator in BigLaw, an in-house counsel and a recruiter for the legal sector — I have seen many associates and others successfully progress in their careers by following these best practices.



### SELF-ADVOCACY

When it comes to career progression, you have to be your own biggest fan. You can do great work day in and day out, but when promotion time comes around, you must be willing to speak up for yourself and remind decision-makers of the contributions you’ve made to the firm. You have to ask for what you want — your manager is not a mind reader. Sitting quietly while assuming your managers will acknowledge all the work you put in without being reminded is sometimes the biggest mistake less experienced and less ambitious associates make.



### NETWORKING

You can’t be afraid to put yourself out there. One way to demonstrate value to your firm is to bring in new business. This is especially true if you have aspirations of making partner

one day. Talk to partners within your firm to learn more about how business development works. Take advantage of every lecture, conference and happy hour as you never know who you might meet. Constantly add to your network when you have the chance.

Networking goes hand in hand with self-advocacy. You have to learn how to sell yourself before you can sell anyone on your firm's services. At the core of a successful career are good relationships, and making a positive, lasting impression is sure to help you nurture relationships that will last.



## MENTORSHIP

Finding a mentor is another great way to jump-start your career. A mentor can share their experience and help guide you through situations that are not so easily navigated alone. A mentor can also assist in your networking endeavors, position you to work on clients that align with your interests and generally point you toward new opportunities.

Most mentor-mentee relationships come about naturally as you work side by side, but many midsize and large law firms have established mentoring programs that assign summer interns, clerks and junior associates to an experienced associate or partner. If your firm does not have a formal mentoring program or an experienced person willing to help you, reach out to your local bar association for resources.



## SHARPEN YOUR SKILLS

One of the best ways to advance your career is to further your education. To get ahead in certain specialized areas of the law, you may need some additional training. Fortunately, most of these programs can now be done remotely, allowing associates greater flexibility and the ability to balance their continuing legal education with their existing workload.



## WORK-LIFE BALANCE

An additional key factor in career progression — and an often overlooked one — is striving for a sustainable work-life balance. It's no secret that this is often difficult to achieve. Time management and setting boundaries come with practice, but those who don't try run greater risk of burnout from their job.

While putting in long hours can certainly help put you on the path to partner, it's equally important to keep in mind that making partner isn't the only option available. Many successful lawyers find in-house, off-track roles or contract work to be fulfilling and a better fit for their lifestyle. They also find positions tangential to the legal field.

There are many different ways to work toward progressing your career, it's just about finding the right solution, or combination of a few, that work for you and your goals. Think intently and purposefully about the long term and how you'd like your career to look in five or 10 years. Discuss your aspirations with a mentor or recruiter who can help you map out a plan to achieve your goals. Investing in yourself today will help you progress in your desired career journey tomorrow and for years to come.

### ABOUT THE AUTHOR

**Lauren Smith** is a Principal for the National Partner Group of Parker + Lynch Legal. She focuses her practice on representing individual partners, counsel and groups in connection with partner hiring and office openings on a nationwide basis. Smith also recruits attorneys at all levels in the Washington, D.C., market for placement in both law firms and corporations. She graduated with a JD from the William & Mary Law School in 2006. She earned her bachelor's degree with distinction from Cornell University. She is licensed to practice law in California, Virginia and Washington, D.C.

## WEB-BASED Financial Management Courses



ALA's **FM 1: Law Firm Accounting** starts **July 13** and continues once a week for six weeks. The interactive course delivers educational content in various formats to suit different learning styles. Want to earn a Legal Management Finance Specialist Certificate? Then, also register to attend **FM 2: Financial Information and Analysis**, which starts **October 12**.

[alanet.org/web-based-courses](http://alanet.org/web-based-courses)

# Anniversaries, Awards and Appointments

## Members on the Move »



**Jeffrey Patrick Downes**, a member of the Minnesota Chapter, is now Firm Administrator at Fisher Bren & Sheridan LLP in Minneapolis, Minnesota.



**Jacqueline A. Johnson**, a member of the Capital Chapter, is now Office Administrator at Akerman LLP in Washington, D.C.

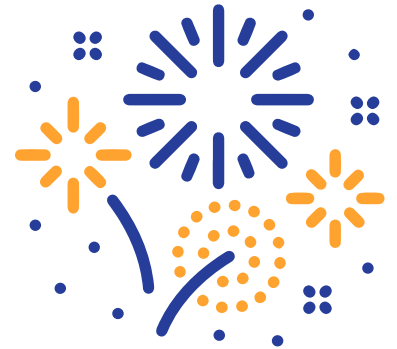


**Lupe Andrea Mendoza**, a member of the Greater Los Angeles Chapter, is now Human Resources Manager at Wolf Rifkin Shapiro Schulman & Rabkin, LLP, in Los Angeles, California.

## Congratulations to a Super Volunteer

ALA member Suzanne Hartness was recently honored as a finalist for the 2021 Mary Catherine Strobel Volunteer Awards by Hands On Nashville, an organization that seeks to meet community needs by connecting the willing to volunteer opportunities. She was recognized in the Direct Service: Capacity-Building Volunteer category for her work with the Legal Aid Society of Middle Tennessee and the Cumberlandns. She took the initiative in event planning, fundraising, development and outreach efforts to grow the nonprofit, enlisting the support of the Middle Tennessee Chapter of ALA and its members' firms.

Hartness is the Chief Operating Officer of Gullett Sanford Robinson & Martin, PLLC, in Nashville. She also serves as the Education Representative for the Middle Tennessee Chapter.



## Honoring a Past ALA President

ALA was saddened to recently learn of the passing of Norma Lee Jefferson, who served as ALA's first female President from 1978 to 1979. Norma died in May 2017 at the age of 85. She worked for more than 30 years in legal administration for three Chicago law firms: Sonnenschein, Wilson & McIlvaine and Much Shelist. Our thoughts are with her family, friends and past colleagues.

# 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.

## Open for Participation: The 2021 Compensation and Benefits Survey

The 2021 Compensation and Benefits Survey and its companion, the 2021 Large Firm Key Staff Compensation Survey, are now open for participation. These surveys provide comprehensive information on law firm salaries, benefits, staffing ratios and turnover. Your participation is crucial to making the report a success. The deadline is July 14; visit [alanel.org/compsurvey](http://alanel.org/compsurvey) to get started.

ALA has switched to a new platform to hopefully make participation more user-friendly. Although every participant will need to create a new account through this platform, we expect the process of filling out the survey to be smoother than in previous years. For example, respondents can now do an Excel upload in order to submit data.



## 2021 Annual Conference & Expo Agenda Preview

Download the agenda preview for ALA's 2021 Annual Conference & Expo! Here is a taste of the thought-provoking presentations, interactive discussions and in-depth sessions you'll experience in Austin, Texas:

- » Default or Defined: What We Can Do to Positively Influence Culture in Our Law Firms
- » From Frazzled to Focused: Techniques on Productivity and Efficiency
- » Navigating the 2021 Workplace: An Employment Law Update
- » The Data Breach Epidemic: What Every Administrator Needs to Know Today
- » What Legal Management Professionals Should Know About Litigation Financing

The full program is coming soon, so stay tuned. Get ready for celebration, education and networking October 3–6! To register or for more information, visit [ALAannualconf.org](http://ALAannualconf.org), call 1-888-593-7243 or email [info@alaannualconf.org](mailto:info@alaannualconf.org). Please quote your registration code: B00-690-690CX11.

## Free for ALA Members: The Successful Firm Project

ALA is working in collaboration with The Successful Firm Project to provide a new approach for you and your team to learn, share and improve practice development. ALA members and their entire firms can take advantage of a complimentary subscription. It's a great supplement to your other member benefits.

This professional network of law firm leaders, subject matter coaches and solution providers is collaborating on what makes firms successful. Participants are looking for creative ways to improve the business health of their firms today and in the future. The Successful Firm Project will provide a point of access for law firm leaders to connect and collaborate by sharing new ideas and best practices. Visit [successfulfirm.com](http://successfulfirm.com) for benefits like:

- ▶ Peer-to-peer Huddles throughout the year
- ▶ Live Playbook webcasts throughout the year
- ▶ Personalized dashboard and tools
- ▶ Content for successful firms

The next Huddle takes place June 15, and the next Playbook webcast is on July 13. Subscribe to get access!



## Register for the 2021 Chapter Leadership Institute

Calling all chapter leaders and Chapter Resource Team members! Are you signed up yet for this year's Chapter Leadership Institute, taking place in person this July in St. Louis, Missouri? The schedule overview is available, so read up on the unique opportunities you could have to learn about and strengthen your leadership role, share ideas and experiences with colleagues and expand your network. For planning purposes, ALA will host a Welcome Reception on Thursday evening, July 15. CLI will officially get underway Friday morning, July 16, and conclude Saturday evening, July 17, around 4 p.m. Join your peers to learn all the nuances of managing a chapter, and network to learn best practices from your peers in various chapters in ALA. Registration closes July 6; read the FAQs at [alanet.org/cli](http://alanet.org/cli) for info about the worry-free cancellation policy and COVID-19 safety measures.

## Register Now for Law Firm Accounting Course

The registration period for FM 1: Law Firm Accounting will come to a close on July 9. The interactive six-week course will then commence on July 13, teaching participants new financial management skills and tools while delivering continuing education credits.

ALA's web-based courses delve deeply into their subject in a classroom-style format — all conveniently online. By completing both FM 1 and FM 2: Financial Information and Analysis, participants can put themselves on track to earn a Legal Management Finance Specialist Certificate that will enhance their résumé and show managers or potential employers that they've gone the distance. If that's the route you're interested in, consider the two-course package.

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

