

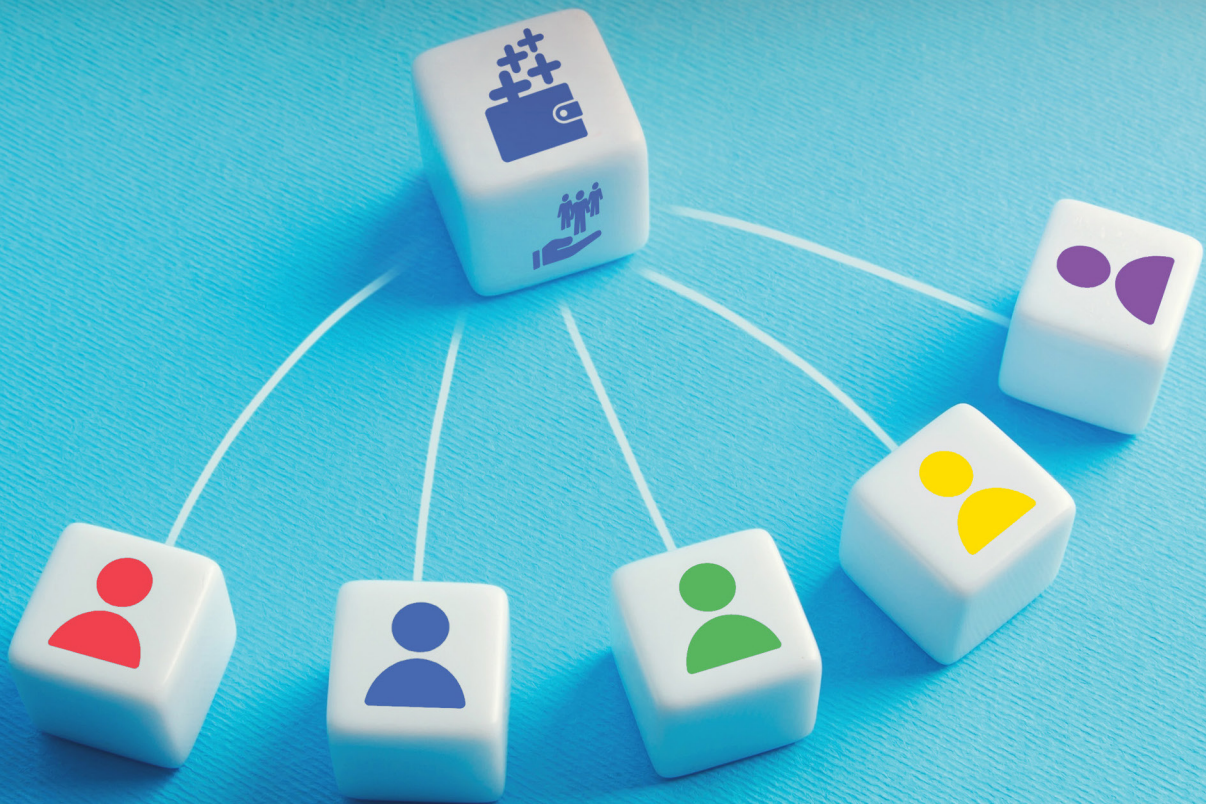
LEGAL MANAGEMENT

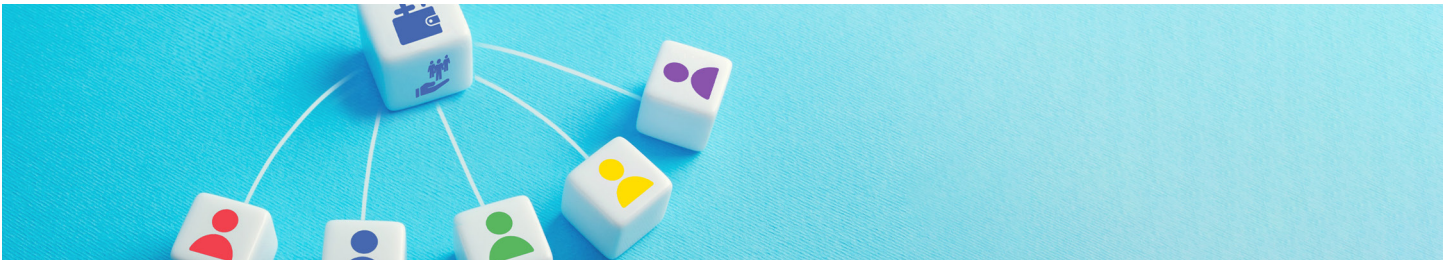
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Firms facing talent shortages should look to their benefits and policies as a recruitment tool.





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“
What separates
privilege from
entitlement is
gratitude.”

– Brené Brown

Gratitude Is the Best Attitude

I get my greatest joy and energy from helping others. It is why I became an attorney, and it is what gives me the greatest happiness and satisfaction in my current job. But the important balance to that is one of my guiding leadership philosophies: **Always demonstrate and communicate gratitude to those around you.**

Four years ago, my law firm got a new chief operating officer (COO). One of the first things he shared with all of us is that he kept a gratitude journal. He listed off a multitude of reasons why he did it and how it helped him get through the difficult times and develop as a leader. I really took to heart what he was saying because he was not your traditional law firm COO — he is a retired U.S. Army colonel who served multiple tours of duty in Afghanistan, is a West Point graduate and even went back to serve as the school’s Chief of Operations before joining our law firm. I knew he definitely knew what he was talking about.

So I started to try and keep a gratitude journal for myself. Some weeks I was good; others not so good. Over time, I found what worked for me was to write down just three things I was grateful for every morning. In the beginning it was a struggle — I wrote down things like, “I am grateful for my new coffee creamer flavor, or that it isn’t raining.” But after a few months, I found it got easier to find things to be grateful for. And when I went back and reviewed my daily journal, I found that the majority of things I was grateful for was other people helping me. Then I realized, why am I keeping this gratitude to myself?

And that is when I really started to see the positive effects that came along with demonstrating your gratitude as a leader. I added to my daily gratitude list a “Say Thank You” line and made sure I told at least one person each week how they had helped me and the impact they made. As I practiced this new routine, I realized the more meaningful and detailed way I explained how that person helped me, the more they felt the genuineness and sincerity of my appreciation. And what I saw happen over time is the creation of a gratitude spider web as those I had expressed appreciation toward began to do the same with other people.

While keeping a gratitude journal may not be your thing, as leaders it is important to build connections with others. And there is no better gateway to connect than expressing your gratitude to others. It will not only help you to feel more positive about the past and more hopeful about the future, it will also inspire those around you!

So how do you start sharing your gratitude?

1. Find two minutes every day to appreciate something or someone around you.
2. Be specific about what you are grateful for.
3. Explain why it is meaningful to you in a genuine way.
4. Focus on what you appreciate about the person — not just the thing they did.

5. Do not only talk about how it benefited you. Give a compliment to the other person like, "You always go out of your way to ..." or, "You really shine when ..."
6. Make it timely and contemporaneous with their actions.
7. Choose how you want to communicate your gratitude (email, chat, in person, phone call, etc.).

Now I would like to express my gratitude for the opportunity to serve as your ALA President. It is an extraordinary honor, and I look forward to the exciting year that lies ahead!

 sarah.evanson@btlaw.com



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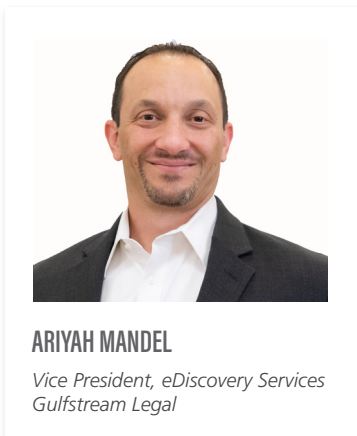


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ARIYAH MANDEL
Vice President, eDiscovery Services
Gulfstream Legal

“
While a managed service agreement can offer a cost-related advantage, it is not always the right solution for every group.”

E-Discovery Contracts: Managed Service vs. Master Service Agreements

Engaging a new discovery vendor or starting a new discovery project can be a hectic time for many in this industry. Then at the end of it, your discovery vendor asks you to sign a contract. You think, “Great! I am in legal; and I’ve got this. I work every day with fixed-price contracts, cost-plus contracts, bilateral/unilateral contracts, adhesion contracts, aleatory contracts and more.”

But then your vendor starts using terms like master service agreement and managed service agreement. In recent years, these terms have not been defined as interchangeably as they have in the past. So what’s the difference between them and which could benefit your group more?

Let’s start by looking at how most vendors are currently using these terms. First, most e-discovery vendors are defining a **master service agreement (MSA)** as a single legal document that consolidates the agreement between the vendor and its client across all active matters, defining engagement processes, payment terms, payment procedures, intellectual property, confidentiality, liability, dispute resolution and often pricing.

An effective way to understand this concept is that if a client has no MSA on file, a similar style contract would be drafted and executed on a project-by-project basis. An MSA, while drafted like a project-by-project contract, allows a vendor and a client to engage on multiple projects without the step of drafting and executing a new contract for each new project and the client has no obligation beyond payment.




Most e-discovery vendors are defining a **managed service agreement** as similar to a master service agreement, with the difference being the following options on top of the standard terms and conditions: more inclusive service offerings, dedicated software

and/or infrastructure, dedicated personnel, less restrictive/full access control over software and/or infrastructure, service-level agreements and better pricing rates. Vendors offer these additional options with an obligation by the client to both pay and meet a minimum threshold of work (often defined by a total allocation of data) and a time period commitment during which the client intends to primarily use the vendor's services.

Think about managed services as the option to outsource all your e-discovery technology needs to a group of experts who not only understand how to run an e-discovery matter and assist with quickly and cost-effectively finding/producing your documents, but also holds a core competency in setting up, running and maintaining a highly available/highly responsive infrastructure to support the demanding needs of e-discovery.

BENEFITS OF MANAGED AND MASTER SERVICE AGREEMENTS

Now that we understand these distinct types of agreements, we need to get into the benefits of each to help decide which would be better for an organization. The benefits boil down to a few key components:

-  Obligation requirements
-  Pricing
-  Service needs

The most important factor most clients must consider is the obligation involved and their ability to meet that requirement. To understand how each type of contract can be of benefit, let's look closer at obligation requirements.

It may not be apparent what benefit could come from agreeing to such a requirement, but consider what your vendor is offering in return. In most scenarios, with this commitment, a vendor will provide discounted pricing, included services (such as user allocation, project management time or processing) or a combination of both. When we consider the possibility of lower rates or having a service included at no additional cost, we can easily see how a managed service agreement could benefit an organization if it has the continued ability to meet the obligation requirement.

THE KEY BENEFITS TO EACH TYPE OF CONTRACT

In a master service agreement, organizations have:

- » No requirements to host a minimum amount of data or provide a minimum amount of work.



- » No defined time period commitment to meet an obligation requirement.
- » No contract requirements needed to begin a new project.

In a managed service agreement, organizations get:

- » Discounted pricing, making the vendor services a more cost-effective solution.
- » Included service offerings, allowing the client to engage the vendor in more aspects of the project without incurring additional expenses.

When evaluating which contract type would best benefit your group, you must consider all the advantages listed above, as well as the ongoing needs of your legal organization. While a managed service agreement can offer a cost-related advantage, it's not always the right solution for every group. My recommendation is to speak with your preferred vendor and discuss its offerings. Often, a vendor will tailor a solution within one of these contract types to best meet your needs.

ABOUT THE AUTHOR

Ariyah Mandel is Vice President of eDiscovery Services at Gulfstream Legal, where he supports clients with the successful application of the eDiscovery framework, ensuring effective design, implementation, and execution of services and technology.

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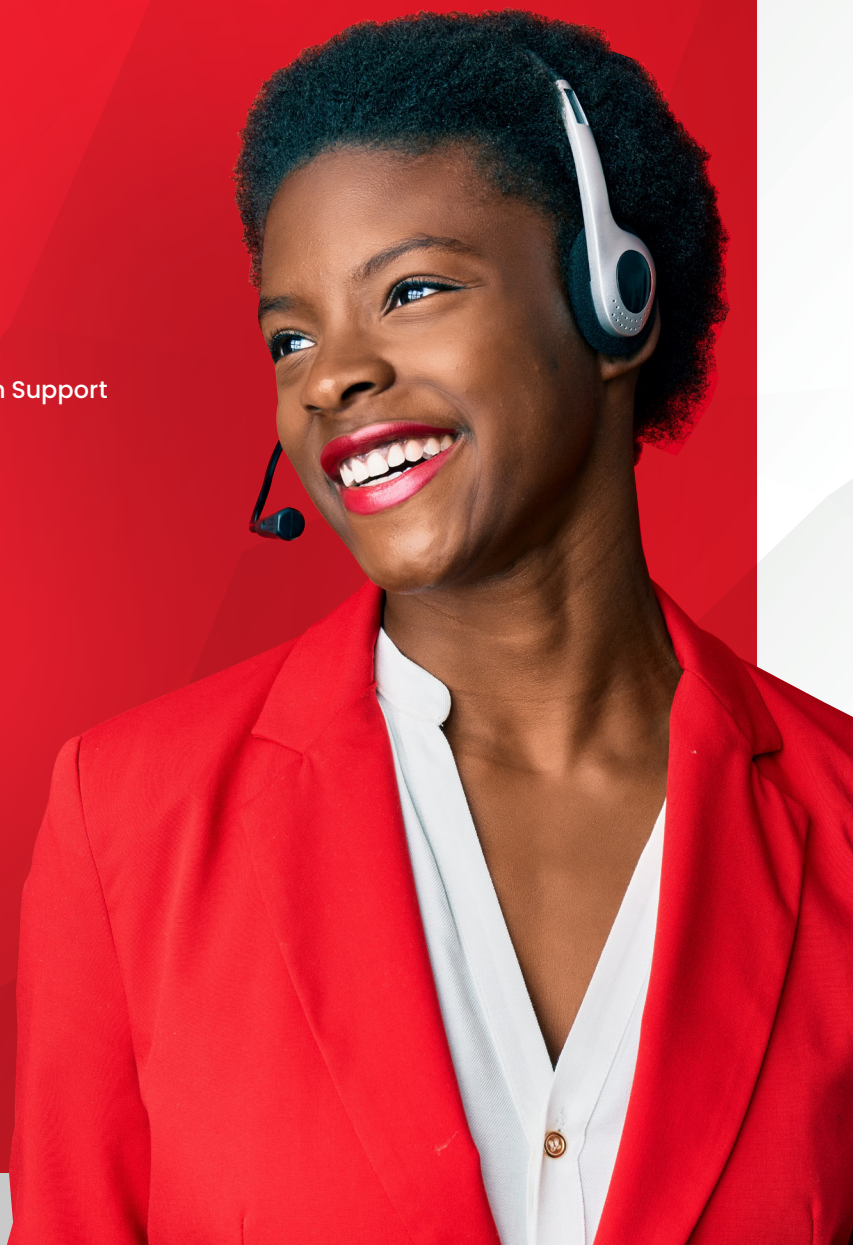
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ALEX YOUNG
ePageCity
Chief Strategist

4 Ways Diversity, Equity and Inclusion Helps Firms Prosper (and How to Achieve It)

Within the legal industry, organizations are taking steps toward making their workplaces more diverse and putting a greater emphasis on diversity, equity and inclusion (DEI). In fact, major firms have recently voiced a desire for more personnel diversity, including creating positions such as chief diversity officers.

Collectively, these are important because it's the right thing to do. An added perk is it can help firms grow and prosper. Here's how.

“Firms must *actively* promote diversity and inclusion through branding, conversation and creating quantifiable company diversity targets.”

1. IMPROVED PERFORMANCE AND PRODUCTIVITY

Diversity and inclusion in the legal industry can increase productivity and performance within the profession. At the employee level, this might mean improved morale and less absenteeism. According to one study from *Harvard Business Review*, if just 10% more employees feel involved, attendance will increase by about one day per year.

2. RECRUITING AND RETAINING HIGHLY COMPETENT PERSONNEL

Firms with diverse and inclusive work cultures attract more candidates and allow employers to recruit from a larger segment. This enables firms and other organizations to develop a highly qualified workforce capable of meeting their demands, resulting in an increased capacity for dealing with complexity and innovation.

Diverse and inclusive work cultures have also been linked to higher employee retention rates. Employees who feel appreciated and respected by their employers are more likely to stay in their current positions for extended periods of time.

3. ENHANCED COMPETITIVENESS AND GROWTH

Firms with diverse and inclusive workplaces and practices may enjoy a better reputation in the broader community and increased access to a growing client base.

A diverse team is knowledgeable about the areas and industries they represent and may assist your organization in expanding beyond conventional markets and consumers through culturally relevant marketing. A law firm or organization that displays diversity gains a competitive advantage, allowing it to flourish and develop. Additionally, this provides an opportunity for individuals to advance their careers.



4. BOOSTED INNOVATION

Ideas do not materialize out of thin air; they are made by teams of individuals. The more varied the people involved are in terms of expertise, educational background, experience level, age, orientation, gender, origin, ethnicity and culture, the more likely they are to get ideas in seemingly unconnected places. These concept pairings result in more unlikely and brilliant ideas.

It increases their passion for what they are capable of doing and redefines the limits within which they usually function while working in homogeneous teams. Additionally, a diverse group of decision-makers may help prevent poor judgments — decisions that could alienate consumers, hurt the brand or hinder growth — simply by incorporating individuals who view the environment differently.

HOW TO ACHIEVE DEI

Legal management professionals must now more than ever lead by example. Consider these strategies for achieving DEI in your law firm or legal organization.

- » **Increase awareness:** Dedicate time to cultivating a culture of self-awareness. It's critical for combating bias and advancing diversity and inclusion in the legal industry. When we become self-conscious, we are pushed to be more receptive and aware of our feelings. This enables us to develop a higher level of emotional intelligence. As a result, we are predisposed to identify prejudices and value the diversity that exists in the world and the workplace.
- » **Use data and metrics:** Measuring your efforts with diversity metrics targets is one of the most effective strategies to increase diversity and inclusion in a law firm. Therefore, other elements — for example, incentives for individuals who achieve the goal — may align around them.

- » **Recognize and educate your staff about prejudice:** It's one thing to convey the importance of diversity to your staff as a legal administrator. However, it is unlikely to improve without concrete measures to identify and combat prejudice. Along with providing team training on how to spot prejudice, build a procedure that allows each employee to learn about and become acquainted with the personal narrative of their colleagues. This information will aid in diversifying the firm's clientele and growing the firm's brand.
- » **Create a deliberate hiring strategy:** If your objective is to improve your DEI efforts, you must have a plan to factor in diversity when hiring new employees, from attorneys to support personnel. Create a deliberate and comprehensive hiring strategy consistent with your firm's mission and values that also places a premium on diversity.

It's not enough for legal organizations to simply create rules and initiatives for DEI. Firms must *actively* promote diversity and inclusion through branding, conversation and creating quantifiable company diversity targets. As a legal administrator, it's important to make strides now so your firm may keep up with the growing demands of the legal profession.

ABOUT THE AUTHOR

Alex Young has headed Chicago-based web design agency ePageCity since 1999, as well as its digital marketing brand, Deep Footprint, as Chief Strategist. Young manages custom website design and development projects as well as digital marketing campaigns for law firms, legal recruiters and corporations.

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Embracing a Holistic Approach to Employee Development

Law firms are using consultants, printed materials and other resources to help firm members reach new career heights.

In today's tight legal talent market, being able to tap into internal resources to fill staff, leadership and other open roles can mean the difference between a law firm incurring recruiting expenses and productivity delays — or providing efficient, consistent client service.

“
 In addition to helping firm members enhance their skillset and overall job performance, law firms that provide professional development could potentially notice its effect ends up rippling through another crucial area of operations: employee engagement.”

While offering tech-training sessions, lunchtime lectures and other professional development options can help firms proactively prepare employees to eventually take on new positions, in the past two years, a number have scaled back on their development efforts due to COVID-19-related budget cuts and social distancing guidelines.

As of mid-2020, 65% of firms in the United States and United Kingdom had suspended all or some of their professional development activities, according to a survey conducted by Leadership for Lawyers and Cote Consultants. Meanwhile, 40% of law firms said they planned to use less coaching. Thomson Reuters research found nearly half (49%) of attorneys also felt the pandemic has had a negative impact on mentorship opportunities.

Some legal industry members, though, are continuing to focus on supplying professional development to help expand employees' skill sets — including Levenfeld Pearlstein, a 100-attorney firm whose succession plan outlines core competencies leadership would like certain positions to possess.

“We make sure they have the appropriate training and coaching ahead of time so they're comfortable, and we're not just [saying], 'OK, it's your turn; let's go,'" says Chief Marketing Officer Melissa Marshall. “They're confident and ready to step into those roles.”

“Cross-training ... is something the firm might turn to if employees are receptive to leadership’s suggestion that they may be a good fit for another role.”

INSIDE JOB

The Law Offices of Jeffery M. Leving Ltd., an approximately 20-attorney matrimonial and family law firm, holds continuing legal education dinner events. These feature a seminar almost every month for attorneys, according to Founder and President Jeffery M. Leving.

The firm sometimes includes younger attorneys on litigation teams in a second- or third-chair role, which offers them a chance to gain practical experience and helps Leving determine when attorneys might be ready to serve as lead counsel.

“Once they become lead counsel, I further evaluate them to see if they could become a mentor to lawyers,” he says. “Then, if they’re functional at a high level as a mentor, I evaluate them [in regard to] becoming a litigation director, because litigation directors are responsible for multiple mentors.”

One of Texas personal injury firm Hilley and Solis’ central internal and external hiring principles comes from a book founders Carlos Solis and Derek Hilley read about a steel company that built plants in farming-based towns instead of traditional steel-making areas. Solis says the company’s owner felt teaching a farmer to make steel was easier than teaching a farmer’s work habits to a steelmaker.

“That kind of stuck with Derek and myself throughout the years,” he says. “We look for farmers.”

When the firm hires one, Solis and Hilley try to facilitate the employee’s growth through various types of training.

The COVID-19 pandemic, for example, prompted the firm to undertake cross-training efforts, Hilley says, so employees could fill in for key job functions if someone needed to miss work.

“We’ve done it in a multitude of ways,” he says. “We brought in outside people to help train — professionals from the industry; we’ve done cross-training through team members and also job [shadowing].”

Cross-training, Solis says, is something the firm might turn to if employees are receptive to leadership’s suggestion that they may be a good fit for another role.

“We want to have pretty open and transparent conversations about where we may see them heading — if we, for example, have a receptionist who may have some talents that could be developed into case management,” he says. “We’ve had employees say, ‘Thank you, but I’m wonderful where I’m at’ — and that’s completely OK. We’ve had other team members that say, ‘Absolutely; what can I do?’”

OUTSIDE ASSISTANCE

Levenfeld Pearlstein also uses numerous external development resources to help employees add and strengthen proficiencies, according to Chairman and Managing Partner Rob Romanoff.

Firm and attorney group leaders are encouraged to participate in professional development groups. Plus, Levenfeld Pearlstein provides professional coaching opportunities, Romanoff says — typically one-on-one sessions that involve specific areas where individuals need skill development.

“Let’s say we’ve got a professional who’s really exceptional, but they need to develop their communication skills,” Romanoff says. “There might have been a time in some law firms where, if someone were asked to work with a coach, it was seen as perhaps addressing a deficiency. We wanted to move it to a point where someone says, ‘I want to raise my hand; I’d like to work with a coach; I want to expand my skill set.’”

External coaching providers, according to Romanoff, don’t necessarily have to be legal industry-specific to be effective; the coach he has met with for roughly a decade generally is retained by C-level executives in various industries.

“I don’t believe he works with any other lawyers,” Romanoff says. “There’s technical skill development that he’s aided me in, both around communication and strategy, but also in just leadership coaching. It’s valuable to me to have somebody outside my organization as one of my strategic advisers and coaches, because I’m able to speak with him about issues I may face in my office in a way that I could not discuss with other people internally in the firm.”

Published materials may be able to provide guidance on some topics. For example, a Hilley & Solis employee who recently wanted to improve her negotiation skills found audiobooks on the topic helpful, according to Solis.

“Our commitment to professional growth creates a compelling vision for people to buy into.”

“We also like to bring in team members when we’re going to have high-level discussions with either opposing counsel or insurance companies,” he says. “We certainly disclose to the parties, ‘Hey, we have somebody here that’s learning; they want to listen in’ — and they get to be a fly on the wall while we do a little bit of work.”

FOSTERING EMPLOYEE ADVANCEMENT

In billable hour environments, convincing attorneys — and potentially hourly employees — to dedicate time to professional development can be challenging. In response, Levenfeld Pearlstein created a separate time-tracking category that firm members’ professional development-related efforts can be listed under.

“If we call it nonbillable time, everyone thinks, ‘I’m not getting credit for it; it’s taking away from my billable time,’” Romanoff says. “We have an investment category. That might be viewed by many people as mere semantics, but it’s really driving at that cultural imperative for personal growth.”

At the beginning of the year, Levenfeld Pearlstein employees create a personal plan that includes information about how they’ll use their investment time. The firm later reviews their progress.

“At the end of the year, we’re all held accountable for whether we really put that effort forth,” Romanoff says. “We don’t operate on a formula, in terms of our compensation; it’s not, you completed these three tasks, therefore you get another \$750 or \$7,500. But the compensation process includes a review of skill development, professional development, as well as the

person’s specific job responsibilities. So it is a factor in compensation decisions.”

In addition to helping firm members enhance their skillset and overall job performance, law firms that provide professional development could potentially notice its effect ends up rippling through another crucial area of operations: employee engagement.

“If you bring people in and train them, and they work their way up the corporate ladder, that usually works better than bringing someone in who’s unfamiliar with the culture,” Leving says. “It also benefits retention, because it communicates to other people that there’s an opportunity to grow here. If you get somebody who’s really talented and they don’t think there’s an ability to grow, they usually look to leave because they want more responsibilities — and they want a future.”

Firms, too, want futures that are filled with highly qualified employees. The professional development opportunities they offer can potentially help them achieve it.

“It’s made a material change in our retention rate,” Romanoff says. “Beyond retention, it’s aided in our recruiting. We’re seen — in Chicago at the very least — as a leader in these areas. Our commitment to professional growth creates a compelling vision for people to buy into. We have a number of people who worked at other firms, in what those firms believed were administrative roles — but they came to [Levenfeld Pearlstein] to enhance their skill set.”

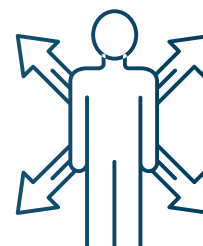
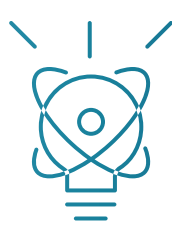
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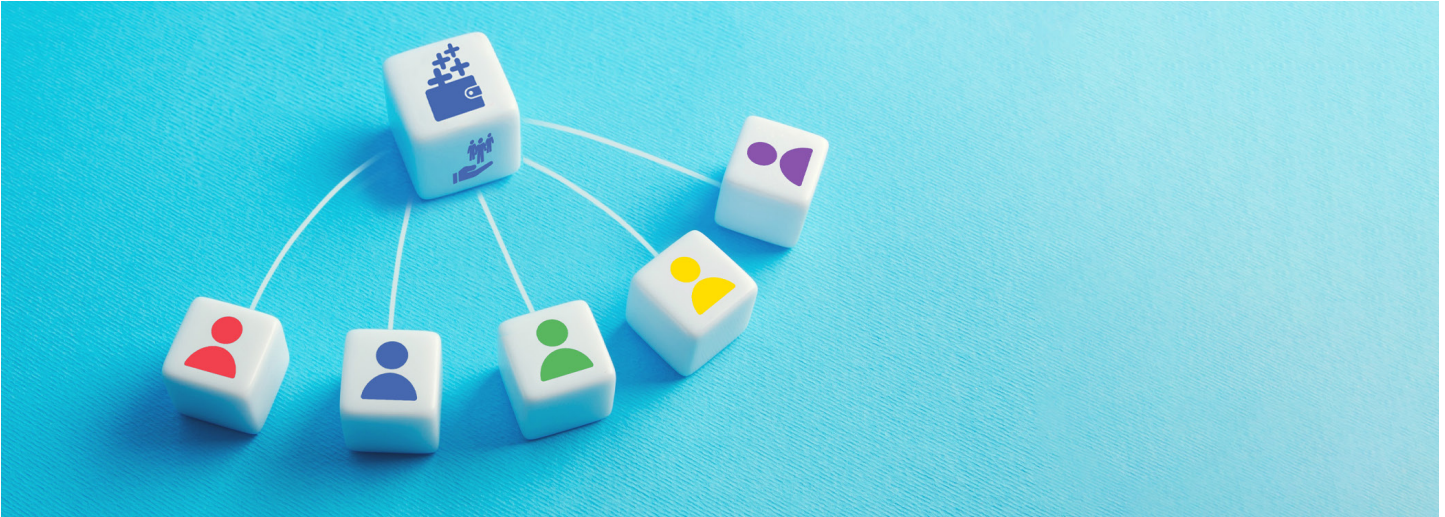
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Recruiting Revamp: How Benefits Can Help You Hire — And Keep — Top Talent

Firms facing talent shortages should look to their benefits and policies as a recruitment tool.

It's impossible to ignore the Great Resignation. You're either living it real time at your legal organization or seeing the phrase with every scroll of your phone.

“To learn how to address employees you might suspect are struggling, ALA began offering the Mental Health First Aid Certification Program in 2021. The initial offering sold out quickly, highlighting the need firms are experiencing when it comes to addressing mental wellness.”

If you are one of the many firms experiencing a talent exit, it's more important than ever to understand why. In fact, a report from McKinsey & Company raised a red flag about the need for organizations to examine the reasons behind what they refer to as the Great Attrition. Based on surveys across multiple industries and continents, their research acknowledged how the pandemic has permanently changed employee expectations. What they discovered is elegant in its simplicity: Show your human side. Now is the moment to focus on the human aspects of work to gain a competitive edge in recruiting and retaining talent.

An analysis of Bloomberg Law's 2021 Law Firm Benchmarks Survey revealed how important it is for legal to show that human side, as law firms are confronting increased HR challenges. Attorney well-being was the most frequently cited concern (55%). Meanwhile, concern about employee retention and overworked attorneys also rose from 13% to 39%, and from 11% to 37%, respectively. Surprisingly, the changes in these areas outpaced business concerns such as lead generation, technology and training.

“Lawyers and staff have taken on even greater family responsibilities and employers must maintain flexibility in work arrangements in order to attract and retain valued employees,” says John DiBattista, Chief Human Resources Officer at Ballard Spahr LLP.

“Sometimes a staff member may need to drop out of the workforce — temporarily — to care for children, elders or other family members. Having a flexible leave of absence policy is an option that can allow the individual to remain employed with benefit coverage.”

To respond, law firms are examining a range of ways they can progressively modify or modernize their HR policies to retain their best attorneys and staff. Here’s what some are doing.

FLEX-TIME AND WELLNESS

While requests for a more balanced work schedule often come from attorneys, Joy Stephens, Senior Consultant at Loeb Leadership, says she has seen more requests from staff wanting to have increased reasonable work-life balance. “[This] includes shorter workdays and fewer expectations of weekend work. I am also seeing more associates and junior partners ask for more routine performance feedback.”

The pandemic has also moved mental health to the forefront. Firms need to be proactive, honest and compassionate in addressing mental wellness.

“Employers should openly recognize the importance of identifying and offering programs that support and address these concerns,” says DiBattista. “Frequent communications about the services offered through the firm will help to remove the stigma of mental and behavioral health issues, which in turn can allow our colleagues to more easily ask for the help they need.”

Providing services and alerting employees to them is only one side — they also need the flexibility to attend to these needs.

Flexibility and wellness are both top of mind at Orrick, which received top honors in this year’s Yale Law Women Top Firms Report 2022 in the Agency & Flexibility category, which measures caregiver support policies, part- and flex-time, and remote work policies. “I think attorneys appreciate firms that think innovatively about agile work and recognize the importance that wellness plays in sustaining a successful career,” says Danielle Van Wert, Senior Manager of Talent Innovation at Orrick.

The firm also offers an “Unplug Time” program. Rolled out in 2021, the policy applies to all members of the firm regardless of role and is part of the firm’s vacation policy. Essentially, they expect lawyers and staff to take one week fully unplugged each year. Others on staff will back up the employee so they aren’t “on vacation” but still tethered to their work email.

“Over 350 Orrick lawyers and staff took advantage of this policy in 2021, and over 150 so far this year,” says Van Wert. “There is a clear correlation between self-care and high performance, and we’re proud to support our teams through these programs and continue to build a best place to work culture at Orrick.”

A RELATIONSHIP-BASED — NOT TRANSACTIONAL — CULTURE

Although employees often switch jobs for better pay, benefits and perks, they also want to be part of an organization that cares about them as people. They want meaningful interactions and relationships — not just transactions. And those connections don’t have to be in-person.

“Our focus is on listening to our teams to understand how we can help them be successful at Orrick, in their family lives and within their communities,” says Van Wert. “We know that’s ultimately the key to staying and thriving in a highly demanding service profession like ours.”

Ballard Spahr’s culture has been a key ingredient in managing its policies. The firm, which also received an honorable mention in the Yale Law Women Top Firms Report 2022 for Agency & Flexibility, was fully remote from March 2020 until October 2021, when it transitioned to a “strongly



encouraged” three-day, in-office schedule. The schedule, with the exception of a weekly anchor day — a predetermined day when team members are in the office to coordinate work and ensure communication — for some practice groups, largely allows lawyers to select in-office days according to their own personal and professional schedules in any given week.

With vaccinations readily available in 2021, many firms eyed Labor Day as the target return to office date. But Ballard Spahr took a different approach.

“Returning to the office in October — rather than after Labor Day like many firms — was intentional,” says Dee Spagnuolo, a member of the firm’s Executive Team and the Partner in Charge, Attorney Career Advancement. “The firm recognized that parents with children reentering school — many for the first time in 18 months — would be best served by avoiding a return to the office and to school at the same time.”

Of note, top management sent “a firmwide message inviting lawyers and staff to come forward to discuss a schedule that would help individuals manage the demands of home and work, including split shifts, reduced schedules or other more creative arrangements,” says Spagnuolo. “We felt it was important to intentionally name the challenge and ensure that our colleagues felt heard and seen. That communication opened the door to start a [dialogue].”

REMOTE WORK AS A RECRUITMENT TOOL

A recent NALP Survey on 2021 lateral hiring reported a record year of lawyers jumping to other firms. Overall, lateral hiring increased by a stunning 111% — the highest change in the 23 years that NALP has gathered such data. Lateral hiring was up in firms of all sizes, in all regions and in major cities.

Interestingly, the pandemic created a new cadre of attorneys at Ballard Spahr — “remote natives” — hired before or after March 2020, who had very little in-person contact with colleagues or staff. Ballard Spahr’s formal lateral integration program, launched shortly after the start of the lockdown, provides a welcome framework of support for attorneys new to the firm.

Over a 12-month period, the program works across departments, providing resources from recruitment; HR; diversity, equity and inclusion (DEI); business development; and other groups to ensure that new laterals have access and ample opportunities to ask questions about life at the firm and how to succeed. The program, which is customized to the individual needs of the attorney, ensures that someone checks in with the new hire regularly.

“Building strong relationships with laterals is critical so they

“Lawyers and staff have taken on even greater family responsibilities and employers must maintain flexibility in work arrangements in order to attract and retain valued employees.”

feel connected to the firm,” says Spagnuolo. “We want to keep the lines of communication open, level the playing field and make sure all new attorneys benefit from the full scope of the firm’s relationships and resources.”

In other words, the pandemic proved operating in a remote world is possible for firms. It’s hard to give that up entirely.

It stands to reason that allowing remote work can help recruit and retain lawyers and also can be part of a critical business strategy. Orrick already had a robust agile work program prior to the pandemic, which allowed teams to quickly adapt to remote/hybrid work, says Van Wert. “The pandemic reinforced our belief that we can deliver excellent client service without being in the office five days a week.”

To measure the impact of remote work, the NALP survey, for the first time, asked offices if lateral hires could work remotely without relocating:

- » 15% of offices responded that they hired lateral partners who did not need to relocate
- » More than 22% reported hiring lateral associates who did not need to relocate
- » 23% reported hiring other lateral attorneys who did not need to relocate

“The ‘Great Reshuffling’ and the intense movement of attorneys in today’s dynamic legal environment is a major reason why we are more open to remote and more flexible arrangements,” says Spagnuolo. “We want the best people, and we are casting a wider net for talent. This means, in the right situation, we will consider candidates outside of our geographic footprint.”

STAFFING LEVELS

With the need to retain and incentivize attorneys and staff, firms also may want to reexamine their actual staffing levels.

“(S)taffing up will allow for some capacity to be shouldered by other associates, partners [and] staff,” says Stephens. “So when someone needs to take two or three months off, it does not cripple the firm, and it does not force the firm to replace

them — [other staff] can hold their position until the person returns.”

How does that work? “It’s basic math,” says Stephens. “If 10 people are working at 100% capacity (read that as about to burn out), then adding just one more person takes everyone down to 91% capacity. Everyone will have less stress and be less likely to quit or take a medical leave of absence.”

Sometimes a staff member may need to drop out of the workforce — temporarily — to care for children, elders or other family members. Having a flexible leave of absence policy is an option that can allow the individual to remain employed with benefit coverage. “If the employee opts against a leave of absence and decides to leave the firm, we would let them know that we would welcome them back when they are ready to return to the workforce,” says DiBattista. “We also would ask if they’d like us to maintain contact with them to provide information about new openings at the firm. We might not be able to offer the same position, but we frequently have openings that they might wish to be considered for.”

PROGRESSIVE POLICIES AND BENEFITS

Reassessing HR policies and programs will require management to be open-minded, willing to listen — and to experiment.

For example, like many firms, Ballard Spahr has a generous parental leave policy of 24 weeks (16 weeks paid; 8 weeks unpaid) for lawyers. But one notable policy difference is the ability to defer, or bank, up to eight weeks to use at a later time. It also subsidizes backup childcare, and at-home childcare or eldercare.

Paralegals and staff are entitled to 12 weeks of fully-paid parental leave for the birth of a newborn (birth and non-birth parents) or placement of an adopted child. In 2022, the firm added fertility coverage for staff and lawyers.

To expand the talent pool of diverse candidates and individuals with disabilities, firms also are changing baseline policies and forming hiring partnerships with additional recruitment sources.

“We have a standing policy dictating that at least one diverse applicant must be interviewed for all open paralegal and staff positions,” says DiBattista. “This policy is at the direction of the Diversity Committee of the Board. HR presents quarterly reports to measure our success in meeting this

commitment and in hiring diverse candidates. In addition, the firm has a partnership with Circa, which sources candidates with a disability as well as veteran and diverse candidates.”

GOING FORWARD AND MAKING AN IMPACT

Above all, communicate, and be consistent in your communications, says Spagnuolo.

“Make time for individual conversations and observe what’s going on. Often, the policies or changes present themselves. Listen to the pressure points and schedule regular interviews. ... Exit interviews can be helpful, but often are too late to keep talent at the firm.”



GET INSIGHT INTO FIRMS COMPENSATION AND BENEFITS PACKAGES

You need all the tools you can get to attract the right talent. Fortunately, the 2022 Compensation and Benefits Survey and its companion, the 2022 Large Firm Key Staff Compensation Survey, can help. Both are now open for participation, and the results will provide the comprehensive information you need on law firm salaries, benefits, staffing ratios and turnover — all the important factors you need for recruiting lawyers and legal staff.

Your participation is crucial to making the report a success. When you complete the survey, you’re contributing to a more comprehensive and detailed data set that can provide your office the edge it needs to stay competitive, especially in the realms of recruitment and retention. Additionally, participating firms receive a discount on the final survey report, plus access to digital dashboards and customizable reports that compare data locally or nationally.

Get started today: alanet.org/compsurvey.

ABOUT THE AUTHOR

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PHILLIP M. PERRY

Freelance Business Writer

“Putting together such an array of plans demands a lot of time and effort, especially for a smaller firm where the staff is already overworked.”

Tracking the Elusive Health Insurance Plan

Finding affordable coverage can be a slog — but these tips can help.

Medical coverage, long the most popular of all law firm benefits, shows no signs of going away soon — or of getting any easier to find. In the most recent ALA Compensation and Benefits Survey, 86.5% of respondents said they offered the benefit to their employees.

“It’s extremely important to have a solid health insurance plan,” says Jack L. Huddleston, Director of Administration at Thomas Horstemeyer and member of the Atlanta Chapter. “Without one, I don’t think a firm can be competitive in today’s market.”

If health insurance is mandatory, landing the right policy can be frustrating. “It seems to be getting more difficult to find good quality, economical health insurance,” says Corry Johnson, Benefits Consultant and Retirement Specialist, GLJ Financial, an ALA VIP Business Partner. He’s helped law firms do just that for two decades.

“One problem is the consolidation of health carriers, so there aren’t as many options as there used to be. A second one is demographics since the population is aging.”

Larger firms have advantages in the process, notes Johnson. First, they can look into self-funded or partially funded plans. Second, they have more leverage with carriers, playing with the benefits mix to make targeted adjustments.

Even the larger firms, though, can encounter unexpected roadblocks if they operate in more than one state. “Carriers tend to treat each office as a separate group,” says Johnson. “So if a firm has 20 employees in Arizona, 20 in California and 20 in Colorado, the firm loses the flexibility it would otherwise enjoy as a larger group.”

GET FLEXIBLE

As those comments suggest, smaller firms face greater hurdles. Self-funding is pretty much off the table, since the risks can outweigh the benefits for organizations with limited employee pools. And their smaller sizes offer little motivation for carriers to provide anything beyond canned policies. “Especially for firms with fewer than 50 people, there’s not a lot of wiggle room in terms of rates and benefits,” says Johnson.

Firms lacking sufficient market clout must spend more time and effort dealing with brokers.

“One challenge for smaller firms is the discrepancy that commonly exists between lower-paid and highly compensated employees,” says Lori Dodge, SHRM-CP, CPP, Accounting Manager at Ross Scalise, a firm with six attorneys and six staff members. Individuals with highly varied incomes will have different expectations regarding premiums and benefits, requiring the firm to offer more than one policy.

Flexibility and creativity can go a long way toward finding just the right selection of policies. At Ross Scalise, premiums under a plan with United Healthcare had risen to \$850 a person per month in 2018. In response, the firm switched to Blue Cross Blue Shield, where the premiums were \$530 a month. The firm restructured the employer-employee portions from a straight percentage of the premium to a sliding scale percentage based on the plan the employee chose.

But the tradeoff for lower premiums under the new plan was more limited coverage. And that brings up a key point: Because the right health insurance can vary by individual, more than one plan is often necessary to satisfy everyone.

“Our firm offers five policies to provide 100% coverage for all of our staff,” says Dodge, a member of the Austin Chapter. All the employees who make less than \$18 an hour are on an HMO; one employee is on a health care savings account (HSA); one paralegal is on a base PPO and all of the attorneys are on silver and platinum PPOs.

Putting together such an array of plans demands a lot of time and effort, especially for a smaller firm where the staff is already overworked. The job can be made easier, says Dodge, by asking employees what they most value before investing time in policy shopping. “What is really important to our people is the 100% copay and a deductible that matches the maximum out of pocket. After they spend the deductibles, they’re not spending anything else.”



No plan will cover everything, and personnel need to be made aware of any likely additional charges. “People need to pay attention to which services are in-network and which are out of network,” says Dodge. “Also, some services, such as MRIs and anesthesiologists, don’t use any kind of insurance. They need to be paid completely out of pocket.”

GET CREATIVE

Law firms aren’t without options when it comes to navigating the health insurance terrain. Johnson suggests looking at the following:

- » **Telemedicine:** Getting health services over the phone is gaining in popularity. Many plans are now bundling it in as an additional feature. And they can pay it off even if not covered by insurance. “One thing to consider is using programs such as Teladoc,” says Johnson. “They do carry an additional cost because they stand alone from the health insurance plan, but their services don’t count against your claims and your loss ratios. That can keep your renewals down going forward.”

- » **Wellness programs:** “Try to use wellness fairs, immunizations and weight loss and smoking cessation programs,” adds Johnson. “They can all have [a] long term very positive effect on your rates. The idea is to try to catch your smaller claims early before they become large ones.”
- » **Level-funded plans:** “These are very similar to partially self-funded plans, and have similar stop losses,” says Johnson. Employers pay set premiums to a Third-Party Administrator (TPA) to cover claims and administrative expenses. “Unlike self-funded plans, they are typically run by fully insured carriers. The benefit is that if a firm’s loss ratios fall below a certain percentage it receives a credit back for funds paid in as premiums.”

GET A BROKER

Law firms say the right broker can help navigate the choppy health insurance waters. “It’s important to have a broker you trust and can talk with,” says Huddleston. “Our broker is our expert. He helps on renewing and assessing plans, getting quotes and resolving any issues very quickly.” For example, when an employee was billed recently for an unnecessary hospital procedure, the broker helped get the charge reversed. Most of the 70 people at the firm take advantage of the offered health insurance plan.

The necessity of a good broker is seconded by Dodge. “Some brokers I’ve dealt with just don’t seem to care much and offer little guidance. Many brokers don’t want to work with a firm with fewer than 25 employees. Our current broker is [from] Foundation Benefits. He is trustworthy and works to fit the needs of our firm, even at the expense of a sale.”

The right broker can also help with one of the biggest challenges for law firms in the benefits area: ensuring that health insurance costs don’t break the bank. “The biggest challenge for most law firms today is providing enough salary and benefits to attract top talent, while considering the effect on profitability,” says Huddleston. “There’s no one solution for all situations. It becomes a fine, fine balancing act.”



DEALING WITH SOCIAL SECURITY

Most people rely on Social Security for at least some of their well-being after retirement. But what if the Federal program isn’t around? There’s been a lot of publicity lately, including a recent Financial Times column, about solvency issues.

Law firms might want to help fill the gap with their own programs to help employees who have completed their working careers. “While there’s no magic bullet, I think more firms should consider doing more with their 401(K) and other retirement plans,” says Johnson. “Many firms already have profit sharing contributions. They might also consider a cash balance plan, which allows participants to put more money in. Many firms are familiar with these plans but have not yet taken a lot of time to look at them.”

There is evidence that law firms are stepping up to the plate with retirement plans of their own. At Atlanta-based Thomas Horstemeyer, employees are eligible after 30 days for the 401(K) plan that has a 4% profit sharing component. And at Ross Scalise, 100% of the employees are enrolled in a 4% match safe-harbored 401(k) plan. “I stress to all of our employees how important it is for them to be enrolled,” says Dodge.

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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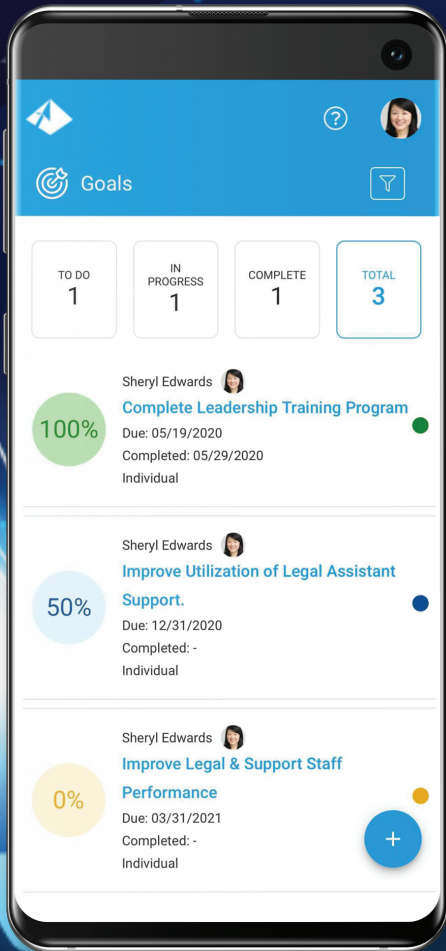
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ROSS FISHMAN, JD
Chief Executive Officer
Fishman Marketing

“
These days, most prospects who are interested in hiring a lawyer will read both the lawyer’s website biography and their LinkedIn profile to obtain additional information, e.g. identifying who they know in common.”

Very Simply, THIS Is Why Lawyers Need LinkedIn

“I have a LinkedIn. But I don’t know where it is.” – Actual quote from a law firm senior partner.

I hear variations of this comment every week. Many lawyers struggle with social media; they’re always asking me about it — how it works, and whether they need it.

Lawyers who don’t understand LinkedIn often proclaim that they don’t need it. Some excuses I often hear include “I have a referral practice,” or, “My clients aren’t looking for their lawyers on LinkedIn.” OK, fair point. But even if that were true, that doesn’t mean you still don’t need a killer LinkedIn profile.

I’ve presented 100+ social media training programs for lawyers and marketers; it’s been among the hottest marketing training and retreat topics for at least the past five years. Not surprisingly, the bulk of the recent queries involves how and why attorneys should use LinkedIn.

There’s significant misinformation regarding the value of LinkedIn. Most business lawyers I know won’t be actively trolling around LinkedIn, sorting their Premium lists, identifying second-degree friend-of-friend connections and looking to generate hot new leads. (Not that they can’t or shouldn’t, but c’mon — readers of *Legal Management* know that most lawyers won’t.)

And particularly today, when everyone’s so darn busy, they’re also not going to take the time to regularly write articles or post LinkedIn status updates.

Essentially, most lawyers aren’t going to be LinkedIn Power Users. And that’s absolutely fine.

When social media was just gaining steam, a variety of highly visible marketing consultants were selling the idea that everyone needed a LinkedIn profile. Many self-anointed “LinkedIn experts” generated a nice, steady income charging firms to set up profiles for all the firms’ lawyers.

That sounded good in theory; however, it yielded the entirely predictable result — empty lawyer profiles devoid of personality or useful information, and very few personal connections. I think that makes them look silly, like a technology amateur dabbling in something they don’t really understand because someone told them they were supposed to. I don’t think that’s the image they should be cultivating.

WHY ALL LAWYERS NEED CREDIBLE LINKEDIN PROFILES

These days, most prospects who are interested in hiring a lawyer will read both the lawyer’s website biography and their LinkedIn profile to obtain additional information, e.g. identifying who they know in common.

This means that at a particularly critical time in our clients’ buying process — when they’re considering adding you to the shortlist — you can use LinkedIn to shape your story in a way that creates a positive impression.

Or you can entirely fail to.

Some argue it’s better to have an empty profile than no profile at all. This might be a subject of legitimate debate, but I think that in a 21st century economy, you can’t completely ignore technology. (Not to mention a lawyer’s ethical duty to maintain a minimum level of technological competence.) Personally, if you’re going to ignore LinkedIn, I think it’s better to look like you’re too busy to need it rather than too ineffectual to use it correctly.

The good news is that once you have a credible LinkedIn profile, it’s a marketing tool that lingers. It sits online near the top of the first page for every single Google search for your name, 24/7/365, just waiting patiently to tell interested prospects your story.

Yes, setting up a credible LinkedIn attorney profile can require a fairly sizable upfront time commitment. But it’s worth it. And you can get help. There are plenty of legitimate legal marketing consultants and writers who can help. I’ve written my share of bold lawyer “About” sections. (For a few of my favorite examples, check out the digital version of this article.)



Here’s a snippet from a good opening of a LinkedIn “About” section. Below is part of a bio I wrote for one of the nation’s top big-case insurance-defense trial lawyers. I wanted him to be bold, to lead with his remarkable trial record, without seeming to brag too much about it:

Litigators talk about being accomplished trial lawyers, although fewer and fewer actual big cases go to trial. When they do, I defend a lot of them — I start a seven- to nine-figure trial nearly every single month. Year round. Nationwide. And I win more than my share of them. ... Basically, I defend multimillion dollar catastrophic-loss, personal injury and property damage cases, nonstop, year-round. I’ve tried major cases to juries in over 25 states, including some of toughest, most plaintiff-friendly jurisdictions.

Working LinkedIn like a lead-generating IBM salesperson requires a level of savvy and effort that is beyond the skills and needs of most attorneys — although some tech-savvy lawyers looking to ramp up their business-development efforts are showing positive results.

Start with the “About” section. It’s the vital narrative part for lawyers who want to get the marketing benefit of LinkedIn without investing too much time.

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 firms dominate their markets. Fishman was the first inductee into the Legal Marketing Association’s “Hall of Fame.” He’s written two books on branding and associate marketing both available on Amazon.

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On the Theme of Wellness ... Is This the Worst Workplace Threat to Your Health in the Stressful World of Firm Life?

Here's how to swiftly assess your risk of suffering a data breach and secure your firm's data once and for all ... alleviating the stress of cybersecurity anxiety.

'We Didn't Know What We Didn't Know' A Story of Hacker Carnage:

In November of 2018, David Eltringham's small law firm was hacked.

*"It was a big deal. We had to notify every single client and contact we've ever had in our DB that their private information had potentially been compromised. **You can't imagine the carnage that does to a small business like ours. Many of our clients went ballistic.**"*

*"We knew we needed something entirely different. **But what?**"*

*"**Our administrator doesn't have the time to become an IT security expert. And most big-name IT security solutions are too expensive for small firms like ours.**"*

*"**And here's the freaky thing:** When we heard all the protections we needed that we did NOT have...well, **we had never even heard of some of them!** Our liability would have been off the charts ... **gross negligence.**"*

This is why I say cybersecurity anxiety might be the biggest workplace threat to a legal administrator's health. If you doubt me, let's look at the ugliest causes of workplace stress ...

Number One: Excessive Workload? Check!

Over the course of a week, **we** small firm administrators could be overseeing *accounting, information technology, human resources, workflow management, facilities and more ... you name the hat, we have to wear it. Our* work is never done. **Our** to-do list is never completed. There is always a fire to stamp out.

And on top of all that we're supposed to be IT security experts as well? When?

Number Two: Lack of Control? Check!

While **we** administrators are RESPONSIBLE for IT security, we often lack the time, knowledge, decision making agency, or purchasing power to address it. **We** have little control, **but we will get blamed when the firm gets hacked!** That anxiety, apprehension and uncertainty hovers over **us** everyday. **We** know a ticking cybersecurity "time bomb" is present, just like at David's firm, but **we** don't have the time or control to diffuse it!

Assess Your IT Security Risks and LOCK Things Down Once and for All - It Might Be the Best Thing You Can Do for Your Mental and Physical Wellness

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Here's Some Advice from Small Firms Like Yours on Cybersecurity Peace of Mind ...



*"I did not believe any security service provider could cater to our situation. It's a great comfort knowing someone is watching out for us and that our data is protected. **I feel confident with BobaGuard.**"*

- Nancy Lanard, Plymouth Meeting, PA

*With Bobaguard I **sleep well at night** and don't worry about the things that used to keep me up.*

- David Eltringham, Boca Raton, FL



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- Galvin Kennedy, Houston, TX

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- Albert Thiel, Albuquerque, NM



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is a quality addition to our
mobile office equipment.”

INNOCN Portable Monitor Keeps Us on the Move

What do you do when you want to travel light with your laptop but still have access to multiple display monitors like you have in the office? You invest in a portable secondary monitor to stash in your laptop bag.

That is exactly what we did when we purchased the 15.6-inch INNOCN portable monitor. INNOCN is a brand that we were not familiar with previously. This monitor is made by a Chinese technology manufacturer and has a very high-quality OLED Full HD 1080-pixel screen. We have used the monitor as an extension to our Windows laptop, but it can also be used to connect to a smartphone, MacBook or tablet.

The 15.6-inch size of the monitor appears incredibly large, especially when we connect it to a laptop with a smaller screen, but the brightness and quality of the display is excellent. There's no software to install; the monitor worked as either an extension or a duplication of the laptop desktop screen as soon as it was powered on. No power cable is necessary when the monitor is connected to the laptop USB-C port. (You can also connect the monitor via the mini-HDMI port.) Plus, it also comes with an attached rubber covering that doubles as a protective covering for the display and can be folded underneath the monitor to form a convenient stand to hold the screen upright.

The uses for a portable monitor like the INNOCN are many. Sometimes we like to work on larger documents, such as a busy Excel spreadsheet or a PowerPoint slide show, using the larger monitor while traveling away from our desktop computer. Other times we simply like to play a movie on the secondary monitor while “working” on something, like Facebook, on our laptop.

One of the most convenient uses for the INNOCN monitor has been when making a presentation to a smaller group of two to three people over a conference table. Instead of dragging along a projector or trying to connect to a TV hanging on the wall, we will simply connect our monitor to our laptop and place it in front of the individuals we are

meeting with. The monitor is large enough to see clearly the presentation we are displaying, but not too big to get in the way of the conversation.

The advertisements for the INNOCN monitor tout it as being a “lightweight,” but we’re sure that is just relative to the weight of a full-scale desktop monitor. When adding the monitor to our laptop bag, we certainly notice the extra weight. At just over 4.5 pounds, the monitor actually weighs more than our travel laptop. With that in mind, we elect to only bring along the INNOCN when we know we need to use it for a presentation or for extended work.

There is really nothing to not like about this secondary monitor (unless you want to get picky about the weight). The INNOCN secondary monitor is a quality addition to our mobile office equipment.

ABOUT THE AUTHORS

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

 twitter.com/BillandPhil




alanet.org/cli

Chapter Leadership INSTITUTE 2022

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CHRIS MENDENHALL
 Executive Director and Legal
 Administrator
 Milgrom & Daskam

“
 At this moment, we have
 no plans to work from a
 single brick and mortar
 location — possibly ever.”

Removing the Brick and Mortar: See How One Firm Operates Exclusively Remotely

About three years ago, I spent a year living and working remotely from Europe. That was unique and interesting enough that I was featured in a series called *Digital Nomad Life in Croatia*. Of course, many people had been working remotely for years, but it hadn't really become mainstream, especially in legal.

Then came the major disrupter of all life as we knew it — COVID-19. Almost immediately, everyone in the world got a taste of working remotely, or at least of realizing that the world of work could look very different from how we always thought it had to be.

As the pandemic begins to wind down (fingers crossed!), many companies are still offering some variation of work-from-home opportunities for their workers. Some companies have even taken advantage of a smaller workforce or flexible scheduling and downsized their physical locations. Once again, I find myself in a somewhat unique situation as my entire law firm has opted to operate fully remotely. At this moment, we have no plans to work from a single brick and mortar location — possibly ever.

There are some downsides to this arrangement. The first that comes to mind for most people is isolation. We are social beings, and there can be creative synergy or mentorship that comes from popping by your officemate's desk for a quick question or document review. Many sticky problems can be resolved over a spontaneous lunch with a boss or a peer. Sometimes our homes are not big enough or quiet enough to serve the dual purpose of also functioning as productive workspaces. Furthermore, some people simply don't work well unless they get out of their relaxed home space and dress up and go to another place where they are expected to be efficient.

Some of these hurdles have been challenges for us, too. Maybe we're just lucky that everyone on our team has been willing to find a way to make it work in exchange for the benefits of no commute, more daily flexibility and the enormous cost savings that can be passed back to employees. Here's how we've found ways to handle these unusual circumstances and cut inefficiencies:

Technology

We use the Microsoft suite of products that allows for easy chatting, videoconferencing and shared, live document storage. A quick question via Teams is no more intrusive (and often less intrusive) than dropping by someone's office in person.

Less time is wasted starting a Teams meeting than waiting for everyone to gather in one conference room. Plus, getting back to work after the meeting isn't delayed by a trip past the water cooler. If a key person does happen to be late, the rest of us can continue working while we wait.

Personal Interactions

We may not get together one-on-one as often as we did when working in the same space, but we have committed to frequent social gatherings, whether virtual or in person. We play games, do volunteer work, chat, have a beer — whatever. I feel I spend more quality time with my coworkers now than I ever have in my past jobs.

Home Offices

Some of our workers have had to be more creative than others when designing a productive workspace in their homes. However, libraries, shared offices and coworking spaces are also options, especially for in-person conferences. Also, there is nothing that says you have to spend your days at home in sweatpants and slippers if you believe you need to dress up to feel professional and productive.

Mail

We have rented a UPS box as our mailing address. UPS will also accept packages and hand deliveries on our behalf, and they will send our mail to us as often as we request.

Some mailbox companies will email pictures of incoming mail so customers always know what is sitting in their box. We have keys to access our mailbox at any time, day or night, if there is something that can't wait for delivery. All important client mail is scanned, emailed and stored in the appropriate client folders online.

Equipment

Everyone has the same equipment at home that they would have in an office, except for maybe a printer/scanner. Since we have no hybrid model where some people want to work at home and in an office, we have no need for duplicate equipment in two locations.

Paperwork

We have two administrative employees who have printers and one of those can also write checks, so if something needs to be printed and mailed — say certified mail or with a check — that is emailed to the person who can handle that task. Receipts and document copies are scanned and stored online. One scanned copy can be efficiently filed electronically and accessible to everyone without any paper printing, copying, delivering or filing.

Signatures are all handled through the same e-signature platform that we use with our clients. If we choose, we can outsource most of the physical production that is necessary for litigated matters, preserving our time for more important tasks and usually costing our clients less than they would pay for one of our employees to do the same work.

The landscape for where most of us can perform our jobs has changed dramatically. For me, working from home is not as exotic as working from Europe, but generally, workers are happier when work fits nicely into the flexible lives they want to live. Businesses are more profitable when productivity is not affected by things like traffic, weather or commute time. An added bonus is the operating budget is not dented with office space rental or the costs of printing and copying, stocking the company kitchen and paying utilities.

ABOUT THE AUTHOR

Chris Mendenhall is the Executive Director and Legal Administrator for Milgrom & Daskam in Denver, where she handles everything at the firm except for practicing law. Milgrom & Daskam is a full-service corporate law firm, a certified B Corporation, and a 1% for the Planet business partner, committed to positive impact while providing superior legal counsel. Mendenhall is also a member of the Mile High Chapter.

 chris.mendenhall@milgromlaw.com

 milgromlaw.com



AMY MOSHER
 Chief People Officer
 isolved Preferred

“
 Creating an environment
 where employees are
 encouraged to grow plays a
 vital role in developing EX.”

How Tech Can Enhance the Employee Experience

Forward-thinking human resource (HR) leaders are taking a broader approach to employee development. They are recognizing that the best way to achieve an engaged and thriving workforce is to focus on building a positive employee experience (EX).

EX consists of every interaction an employee has with their employer, from onboarding to offboarding. It's influenced by the connection they have with the corporate mission, the relationships they build and how they are supported and compensated.

For most law firms, boosting EX is part of their corporate strategy. According to isolved's 2022 survey of 500 HR leaders, 86% of respondents in the legal field said it has become a broader company initiative.

Creating an environment where employees are encouraged to grow plays a vital role in developing EX. According to isolved's survey of over 1,000 employees, many organizations are missing the mark: Only 21% of employees reported that their employer adequately supports their professional development.

THE ROLE OF TECHNOLOGY

Human capital management (HCM) technology can play a significant role in facilitating development. However, law firms are slower to adopt digital solutions. According to the HR leader survey, only 14% of organizations in the legal industry are actively investing in a digital-first approach to HR, compared to 71% of the entire sample.

“Limited HR staff” and a “lack of executive buy-in” were identified as challenges holding them back, along with the top reason — “it’s not a priority.”

Law firms shouldn't view this as a concern, but rather an area for opportunity. Even without adding HR headcount, organizations can often provide great EX by making technology a priority and investing in it.

FROM ONBOARDING TO OFFBOARDING

Not all HCM technology is equal. Disparate systems not only create data siloes but also add additional places where employees must go to manage their careers. This also creates challenges for admins who need to track this information.

By automating consistent and informative employee processes in a single platform, employees feel empowered to take an active role in their development. Intelligently connected HR technology can suggest the next move for the employee when their performance review, for example, is housed in the same system as learning courses.

Leveraging best practices and improving transparency of information are keys to improving EX. Ultimately, this optimizes the workforce's time, decreases turnover and automates best practices throughout the employee journey.

EVOKE INTEREST DURING RECRUITMENT

Candidates often get discouraged by a complicated and impersonal application process. Organizations should consider how the experience matches up with the expectations applicants have in their day-to-day lives. With HCM technology, emails can be automated to ensure a regular cadence of communication, while text messaging can be used for those who have opted in. This allows for communication in the way the candidate prefers and makes a great first impression.

EMPOWER WITH SELF-SERVICE

Historically, onboarding has been a time-intensive process, but this is no longer the case. Onboarding software with self-service tools enables new hires to complete all necessary paperwork, elect benefits and acknowledge the employee handbook from the convenience of their cell phones. As a result, they are ready to hit the ground running.

ENLIGHTEN THROUGH LEARNING

Employees also expect a digital, consumer-like way to receive training. A learning management system (LMS) is typically the vehicle to deliver it. In fact, the same employee-facing survey found 55% of employees would like their employer to support their professional development through an LMS. These systems have come a long way, serving up right-sized content and gamification elements to encourage participation.

ENGAGE THROUGH COLLABORATION

With the popularity of remote work, many employees have lost the ability to learn through interaction with coworkers. In fact, a study of over 61,000 Microsoft employees found



remote work caused workers to spend about 25% less of their time collaborating with colleagues across groups. While apps like Teams and Slack help, they can also be somewhat transactional. Having an employee portal can allow for genuine connections by offering groups the ability to share, celebrate and communicate.

ELEVATE THROUGH GIVING

Social-good programs are becoming a cornerstone of many EX initiatives because employees want to be empowered to contribute to causes they are passionate about. Although some organizations already support various giving and volunteering opportunities, keeping track of these programs can become cumbersome. Workplace giving platforms can help track donations, log volunteer hours and communicate impact.

ENDURE AFTER OFFBOARDING

There comes a time when every employee must move on. HCM platforms simplify the offboarding process, so employees leave with a lasting good impression. It also gives organizations the ability to re-activate them quickly should they return.

Technology can give organizations a boost when it comes to taking a holistic approach to employee development. With greater emphasis on EX, even tech-reluctant law firms can reap the benefits of a skillful and supported workforce.

ABOUT THE AUTHOR

Amy Mosher is the Chief People Officer at *isolved*. With more than 20 years of global human resources experience, Mosher has contributed to the success of multiple public and private companies across various industries, including software, biotechnology and hardware. For the last decade, she has served as the Head of Human Resources with Accel-KKR SaaS software portfolio companies, including HighWire Press, Inc., KANA Software, Inc. and, now, *isolved*.

 isolvedpreferred.com

Anniversaries, Awards and Appointments

Members on the Move »



Angel M. Coe, SPHR, a member of the Austin Chapter, is now Director of Administration at Fenimore Kay Harrison & Ford, LLP in Austin, Texas.



Bonnie Thayer Dubier, an Independent Member, is now Director of Operations at Bleakley Baval Denman & Grace in Tampa, Florida.



Andrew Gates, an Independent Member, is now Library and Research Manager at Tucker Ellis LLP in Cleveland, Ohio.



Beverly P. Herring, CLM, SPHR, GPHR, a member of the Atlanta Chapter, is now HR Manager at Seyfarth Shaw LLP in Atlanta Georgia.



Stephanie A. Hood, a member of the Boston Chapter, is now Executive Director at Hirschler Fleischer in Richmond, Virginia.



Stacy Locsin, a member of the Minnesota Chapter, is now Director of Human Resources at Fish & Richardson PC in Minneapolis, Minnesota.



Julie McKenzie, a member of the Mile High Chapter, is now Director of Operations Higgins, Hopkins, McLain & Roswell, LLC, in Denver, Colorado.



Daniel S. Peracchi, CLM, a member of the Suncoast Chapter, is now Chief Operating Officer at La Cava Jacobson & Goodis in Tampa, Florida.



Sending Our Condolences



ALA is saddened to report that member William M. Kunkel passed away in April. William was a member of the Knoxville Chapter and worked as a Chief Financial Officer at Lewis King. Our thoughts are with his friends and family.

ALA
Association of Legal Administrators

ALA's Logo Shop

Show your ALA spirit with these custom products!

Get your ALA gear here:
alanet.org/logoshop

What's Happening at Headquarters



ALA's Annual Conference was back in full force in person in Kissimmee, Florida. Members gathered May 15–18 for four days of education, networking, making connections with business partners in the Exhibit Hall and just having fun.

On May 17, ALA held its Annual Meeting virtually, marking the annual transition of Association leadership. Sarah Evenson, JD, MBA, was officially handed the Presidential gavel from Michael T. Bumgarner, CLM, CPA, CGMA.



2022-23 Board of Directors

From left to right: Travis Armstrong, CLM, CPA; Holly K. Pulido; Karie Rivkin, CLM; Clara E. Onderdonk, CLM; President-Elect Geoffrey M. Williams, CLM, MBA, MDiv; President Sarah Evenson, JD, MBA; Kevin S. Lee, JD, MDiv; Immediate Past President Michael T. Bumgarner, CLM, CPA, CGMA; Judith A. Hissong, CLM, PCC; Jerry G. McPeake, MSLA; Amanda R. Koplos, CLM, CPA; Eric Hightower, CLM, MBA, SPHR.

We also want to recognize those whose terms ended in Kissimmee: Debra Elsbury, CLM; Jenna Carter; and Jean D. Jewell, CLM. Thank you so much for your service to the Association!

See You in Seattle

Even though we just wrapped up the festivities in Kissimmee, planning is already underway for the 2023 Annual Conference & Expo in Seattle, Washington. Join us in the Emerald City, May 7–10, for more opportunities to keep you connected to all things legal management.

More details will be arriving in your inbox soon, but if you already know you don't want to miss out, you can register now by heading over to alanet.org/events/2023-events/annual-conference.





Congratulations to ALA's 2022 Award Recipients

Every year at our Annual Conference, we honor the stellar accomplishments that our members have done in the last year to advance the legal management profession. The achievements by these individuals and chapters are what makes ALA such a strong community.

On behalf of the entire ALA Board of Directors and everyone with ALA, we congratulate you all on these achievements.

OUTSTANDING ASSOCIATION VOLUNTEER AWARD

Many think of this as a "Volunteer of the Year" award, but the basis for the award is not limited to service an individual has provided during the prior year. Recipients have been recognized for either service on particular projects or continuous/ongoing volunteer efforts, and generally such service or efforts are at the international level. There are no specific criteria for this award beyond what's stated here.

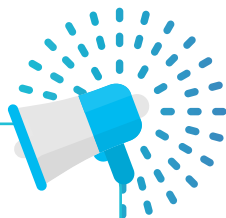
Congratulations to the 2022 recipients:



Brian P. Gilman, CLM **Smith Debnam** **Raleigh, North Carolina**

Brian P. Gilman, CLM, joined the organization in 2004 and has been an active volunteer and advocate at both the Raleigh Durham Chapter and at ALA international. He currently serves as the Vice President of the Foundation of the Association of Legal Administrators' Board of Trustees. Additionally, he served on the ALA Board of Directors from 2018 to 2020. Brian's contributions undoubtedly were critical to the Association's future given the period of leadership transition and change. Before joining the Board of Directors, he served in myriad volunteer roles, including as a Regional Representative and as a member of the Financial Management Task Force and the Regional Nominating Committee — just to name a few.

As one member put it: "Brian is the consummate advocate for ALA, both nationally and locally. By sharing the Association's message and purpose, Brian has continued to bring new talent to the Association. Brian's demeanor is one of calm and reason, always keeping the health and future of the Association and its members at heart."



OUTSTANDING ASSOCIATION VOLUNTEER AWARD



Stephanie A. Hood
Hirschler Fleischer
Richmond, Virginia

Stephanie A. Hood joined ALA in 1995 and has been an active volunteer at the chapter and international level. She began her service with the Boston Chapter in 2007, ultimately serving as Chapter President in 2013. She became a Trustee of the Foundation of the Association of Legal Administrators in 2014, where she worked tirelessly to advance its mission and goals. She also served as the Foundation's President from 2017 to 2018. Stephanie is always behind the scenes encouraging and mentoring others in the profession and championing ALA membership. Stephanie is currently a member of the Chapter Resource Team.

As one member notes, "One of Stephanie's biggest strengths is her thoughtful, fair and consistent approach to everything she does. She is respected by those for whom she works and who work for her, as well as by colleagues throughout the profession. She is a motivator, a change agent, a mentor, a leader, a champion of others and of the ALA. Those who are lucky enough to have worked with her and know her also call her a friend."



**Rita R. Nielsen, CLM, PHR,
SHRM-CP**
Locke Lord LLP
Chicago, Illinois

Rita R. Nielsen, CLM, PHR, SHRM-CP, joined ALA in 1997 and has been an active volunteer at both the chapter and international level. In addition to her many years of service on the Chicago Chapter board, she has served six consecutive years as a member of ALA's Certification Committee, where she is a staunch champion of the Certified Legal Manager (CLM)[®] program. When she began her own CLM certification journey in 2007, she learned the value of studying with a group of cohorts in Chicago. But she didn't stop there. After receiving her certification that year, she continued to help others obtain their certification, first by developing 250 questions for a sample test that study groups still use today. She attends study sessions year after year to offer her knowledge and words of encouragement. Rita is a guiding force for creating a direct path to certification for hundreds of ALA members throughout the country and beyond. Rita has also served on the Association's Nominating Committee and the 2005 Annual Conference & Expo Planning Committee.

As one member states, "ALA Chicago's study group is doing a great job helping CLM candidates to achieve results. I can't underline more the help of Rita Nielsen, ALA Chicago's CLM Director, as well as the selected speakers during the process. I am grateful to Rita for helping me through my CLM journey. I am proud to say I am the first international ALA member to earn the CLM certification."

ELEVATE ALA AWARD

As of the 2022 awards season, the Elevate ALA Award will recognize up to three recipients whose efforts in professional development, networking, visibility and inclusion are exemplary. These efforts should demonstrate advancement in the following areas:

- * Professional development content
- * Relationships between legal management professionals and their peers, as well as legal management professionals and business partners
- * ALA's prominence in the legal community
- * Diversity, equity, inclusion and accessibility (DEIA)
- * This award is now open to chapters, individuals, law firms, legal departments, business partners and other organizations in the legal community.

Congratulations to the 2022 recipients:

California Chapters



East Bay Chapter



Golden Gate Chapter



Greater Los Angeles Chapter



Orange County Chapter



San Diego Chapter



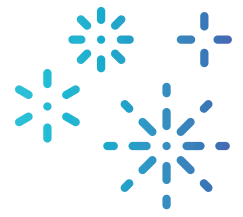
Sacramento Valley Chapter



Silicon Valley Chapter

The COVID-19 pandemic caused all legal management professionals to make major adjustments to their everyday professional lives, but everyone knew that they could look to their ALA peers and chapters for support as they navigated the new normal together. The seven California chapters of ALA were faced with ongoing pandemic restrictions, but they had a driving need to bring members together and educate them during an uncertain time — especially about the employment law updates that are so critical to California employers. Together, the chapters decided to host the inaugural California Legal Management Conference (CaLM) in January 2021. Volunteers worked for months to organize the all-day virtual conference, which was free for members of the California chapters.

Ultimately, more than 500 people attended — ALA members from California and other states, business partners and even nonmembers. The agenda focused on employment laws, mental health in the workplace, leadership and diversity, equity, inclusion and accessibility. Participants raved about the refreshing education, geared toward a modern hybrid team environment; the ability to earn CLM and other continuing education credits; the inclusion of business partners; and the collaboration among peers. CaLM was such a success that the chapters are considering making it a biennial event. Furthermore, the chapter presidents unanimously voted to donate the profits to the Foundation of the Association of Legal Administrators. They gave over \$3,000 to support the Foundation's initiatives.



ELEVATE ALA AWARD



Loeb Leadership

Loeb Leadership was nominated for this award by the New York City Chapter, but the company's influence can be felt throughout the Association. Loeb Leadership works with many ALA chapters and has offered high-level training at the international level. Indeed, many will have participated in Loeb workshops and sessions at the 2022 Annual Conference & Expo. The New York City Chapter, in particular, was able to identify Loeb Leadership's exceptional work in all the areas weighed by the Elevate ALA Award.

In the realm of professional development, Loeb Leadership provided topical, CLM-accredited programming throughout these pandemic-affected years — even on short notice, when events were rescheduled and moved to a virtual format. Its team members made frequent appearances at ALANYC's virtual and in-person networking events, and the company hosted a Business Partner Hangout complete with a cooking demonstration to strengthen its relationship with members.

In fact, Loeb Leadership continues to be a highly visible business partner for the chapter: Founder Natalie Loeb, MS, serves on its Business Partner Advisory Council and mentors new business partners, and the company collaborates on projects with other business partners. It also maintains a robust social media presence that often highlights and elevates ALA and its chapters. Finally, Loeb Leadership has made a major commitment to providing cutting-edge training, workshops and assessments on diversity, equity, inclusion and accessibility.

According to one nominator, "From personal observation, they truly practice what they preach, and it's refreshingly noticeable every time a different member of their team teaches our sessions."

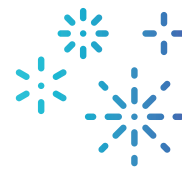


Mile High Chapter

For the second year in a row, the Mile High Chapter has received the Elevate ALA Award. The chapter has continued to demonstrate advancement in the areas under consideration. Mile High has maintained its relationships with institutions like the Sturm College of Law's legal administration program, the Rocky Mountain Paralegal Association and various community colleges. That has expanded awareness of and interest in the profession, provided internship and employment opportunities and allowed the chapter to offer input so that curricula better support the needs of the modern law firm. In 2021, Mile High added to its roster the Executive High School Internship Program at the Warren Occupational Technical Center, Red Rocks Campus, ensuring that high school seniors learn about non-attorney legal careers and how to plan for success in the field.

The chapter's involvement in the internship program has helped advance its goals in the areas of professional development, networking, visibility and diversity, equity, inclusion and accessibility. Chapter members taught the legal and criminal justice students about the inner workings of law firms, the type of education required for various positions and the expectations of the work environment. Perhaps most importantly, the members shared how they had entered the field and how their careers had evolved. Assisting with the internship program helps provide a pipeline to legal careers for students from all walks of life, and the experience prompts ALA members to not only "pay it forward" to young people in the community but also hone their professionalism and presentation skills.





NEXTGEN LEADER AWARD

The NextGen Leader Award recognizes up to 40 members per year that embody the essence of the ALA Code of Ethics through their accomplishments, their leadership qualities and the impact they are making on their legal organization, the legal industry and the Association.

Recipients of the NextGen Leader Award demonstrate conviction, dedication and relentless pursuit of personal and professional excellence through their engagement, advancement and influence in early interactions with the Association of Legal Administrators. Examples of this impact may include volunteering to support an initiative, activity, or event-related program or project at the ALA chapter or international level; joining a committee or task force; serving as a chapter officer; recruiting new members; or introducing innovative new ideas to elevate the visibility and relevancy of the Association at the chapter and/or international level.



Gretchen Kendall Pratt Morse Barnes-Brown & Pendleton, PC Waltham, Massachusetts

Gretchen Pratt joined the Boston Chapter in 2017. Immediately, the chapter benefited from her energy, leadership and knowledge.

She advocates for ALA and the chapter to the staff at her firm, encouraging membership, bringing them to events and promoting the Certified Legal Manager (CLM)[®] program.

Additionally, she is an active member of the chapter's Education Committee and has helped bring many programs to its members. She isn't afraid to voice her opinions and then back up her suggestions with action by contacting speakers on a variety of topics and curating educational content.

In 2021, Gretchen connected the Boston Chapter to a consulting vendor her firm used and successfully planned and implemented a program on law firm economics and trends in 2020 and 2021. This year, she is planning programming on mental health issues and awareness in law firms. Gretchen also moderates a bimonthly roundtable for chapter members who work at law firms outside Boston.

Given her impact on the Boston Chapter, it is often difficult to remember that Gretchen has only been a member for a few short years. She has taken the chapter by storm, and its members are all the better for it. She brings new thoughts and ideas from her impressive background, as well as energy, support and leadership. Gretchen was recently named to the chapter's Board of Directors as the Secretary for 2022–2023. She will undoubtedly continue to do great things for the Boston Chapter and ALA.

Tracy Laskos Phillips Law Group, PC Phoenix, Arizona

Since joining the Arizona Chapter in 2019, Tracy Laskos has quickly become an indispensable member and helped improve chapter operations in so many ways.

When Tracy attended her first chapter event, she made her mark on ALA. She arrived early and introduced herself as she welcomed each person into the room. She asked questions, provided insights and even completed the feedback survey after it was over. Tracy has improved how the chapter welcomes new members by sharing her experience and doing the work to make the changes happen.

She's since become a driving force for the chapter, whose leadership feels lucky to have someone willing to commit to committee positions, task forces and board positions. She has brought in new members and became an officer on the board. Tracy is the 2022–2023 President-Elect of the Arizona Chapter.

Tracy is cultivating a network that will serve to engage and support everyone, and she has proactively sought out connections through ALA all over the country — and at home. When she began her firm's reorganization, she made sure to encourage several staff members to join ALA and make the most out of the organization. She has begun coaching others within her firm and has reached out to nonmember legal management professionals in her area. She has recruited several new members to ALA because of her natural ability to motivate and encourage. As Tracy continues her ALA trajectory, she will be a beacon and inspiration to all.





NEXTGEN LEADER AWARD

Vicki Scott **Rosenberg and Pick,** **A Law Corporation** **Los Angeles, California**

Vicki Scott has been a member of the Greater Los Angeles Chapter of the Association of Legal Administrators (GLA ALA) since July 2018 and has been a quiet, reliable force for the chapter. She truly cares about presenting the chapter at its best and promoting every activity that they do.

She is an active volunteer within the chapter, serving on the Community Connection team; Business Partner Team; and the Diversity, Equity, Inclusion and Accessibility (DEIA) team. She also volunteers her time with special events. Additionally, she has also been a great contributor on the Business Partner Team and assisted with creating virtual events to promote the services of their business partners.

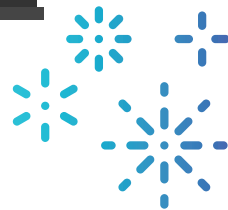
Her caring, volunteer spirit repeatedly goes above and beyond. The COVID-19 pandemic made it difficult to gather in person for the chapter’s annual Food from the Bar event at the Los Angeles Regional Food Bank. That didn’t stop Vicki, though. She stepped right up, wearing protective gear to assist in getting the job done. Additionally, she created a flyer for a book drive that helped migrant children being housed at the Los Angeles Convention Center. Most recently, she volunteered to be the secret shopper for the LA County Department of Public Social Services’ Adopt-A-Family Program during the holidays.

The future looks bright with Vicki Scott on the GLA ALA team.



PRESIDENTS’ AWARD OF EXCELLENCE

The Presidents’ Award of Excellence is a performance guideline named in honor of all our Past Presidents. It is used to encourage chapters to take effective and collaborative action in support of ALA’s mission to promote and enhance the competence of legal management professionals, improve the quality of management in law firms and other legal service organizations and represent professional legal management and managers to the legal community and to the community at large. The following chapters received this distinction:



- | | | | |
|------------------------|----------------------------|-----------------------------|-----------------------|
| Alamo | Dallas | Knoxville | Oregon |
| Arizona | East Bay | Las Vegas | Philadelphia |
| Atlanta | First State | Metropolitan Detroit | Pittsburgh |
| Austin | Gateway | Middle Tennessee | Puget Sound |
| Boston | Golden Gate | Mile High | Raleigh/Durham |
| Calgary | Greater Kansas City | Minnesota | Richmond |
| Capital | Greater Los Angeles | New Jersey | San Diego |
| Central Florida | Houston | New Orleans | Silicon Valley |
| Chicago | Independence | New York City | South Florida |
| Columbus | Indiana | Northern Virginia | Wisconsin |
| Cyber | Jacksonville | Orange County | |

What's Happening at Headquarters



Contribute to the Legal Management Community's Compensation Knowledge

The 2022 Compensation and Benefits Survey and its companion, the 2022 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. When you complete the survey, you're contributing to a more comprehensive and detailed data set that can provide your office the edge it needs to stay competitive, especially in the realms of recruitment and retention.

For complete details — and to preorder the reports, visit alanet.org/compsurvey. The reports will be published in the fall. Questions? Contact compsurvey@alanet.org for assistance.

For complete details — and to preorder the reports, visit alanet.org/compsurvey. The reports will be published in the fall. Questions? Contact compsurvey@alanet.org for assistance.

Register Now for CLI

Calling all chapter officers and volunteers! Registration is open for the 2022 Chapter Leadership Institute (CLI), to be held July 15–16 in Las Vegas, Nevada! Come connect with peers, attend leadership workshops and, of course, enjoy Sin City in what is sure to be an informative and fun-filled weekend. Those interested in chapter leadership are also encouraged to attend. Register at alanet.org/cli.

ALA has secured rooms in the Bally's Las Vegas hotel at a rate of \$85/night plus fees and taxes. But you must book by June 13 to secure that rate, so act fast!

Don't Let Technology Requirements Catch Your Firm Flat-Footed

Are you looking for an easier way for your firm to keep up with technology competency requirements? On June 21, The Successful Firm Project is hosting a Q&A with the team behind the Legal Technology Core Competencies Learning Plans and Certification program and Certification program (LTC4). LTC4 offers training so lawyers can stay up to date with ever-changing technology and maintain a secure workspace.

Sign up at successfulfirm.com/product/huddle-ltc4 to learn and ask questions about how to participate in the LTC4 program. ALA members and their firms get complimentary access to the Successful Firm Project's articles, newsletters and events. If you miss the Q&A, you can watch the recording at any time.

It's Time to Talk About Time Management

In today's fast-paced world, time management is key to ensuring tasks are done correctly and on time. During this month's session of the Chapter Leader Educational Series, current and prospective chapter leaders can discuss how to promote effective time management skills among administrators and organizations. The program will be held Wednesday, June 22 at 2 p.m. Central. Register at alanet.org/cles to receive information about how to join.

