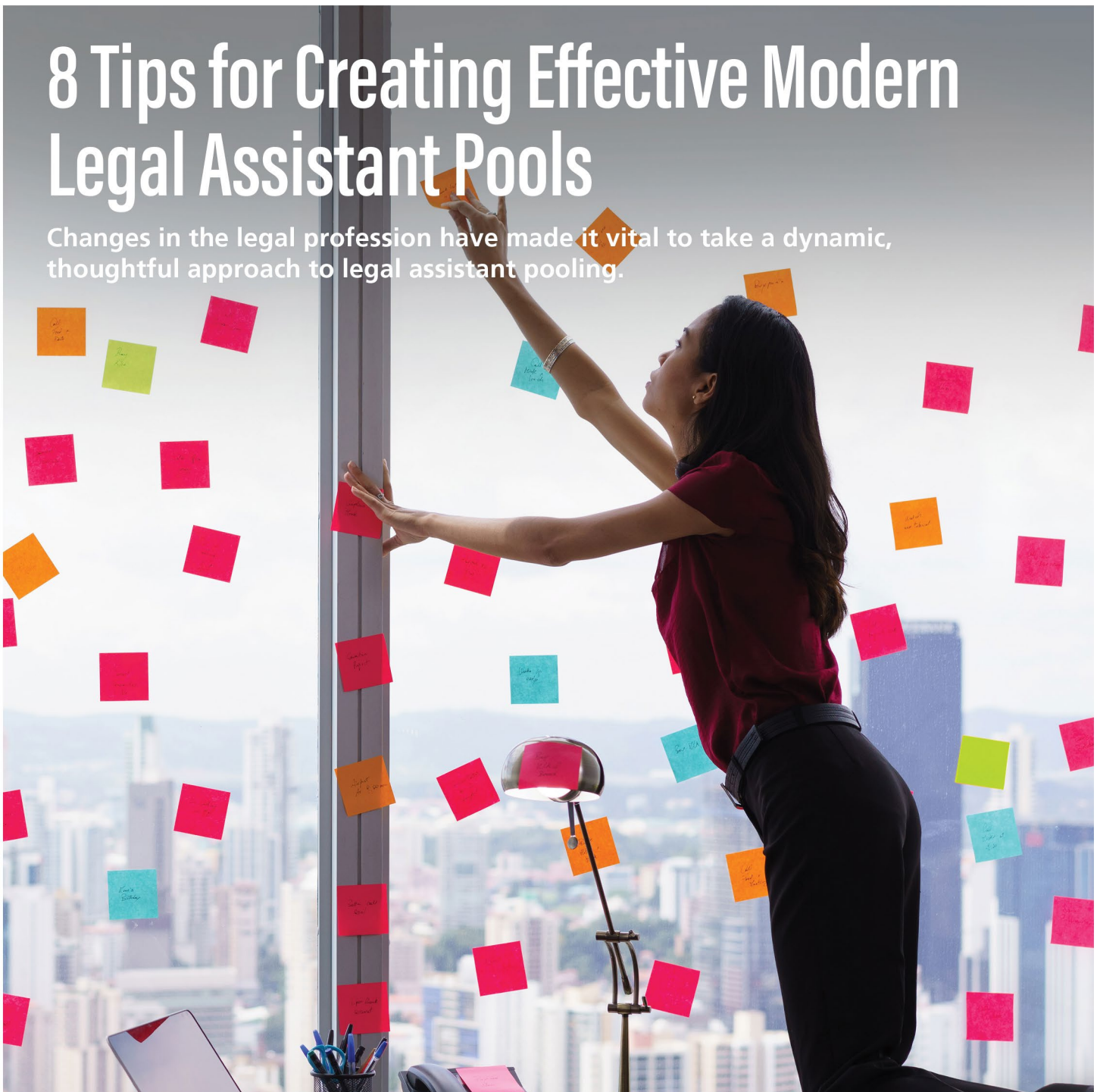


LEGAL MANAGEMENT

THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

8 Tips for Creating Effective Modern Legal Assistant Pools

Changes in the legal profession have made it vital to take a dynamic, thoughtful approach to legal assistant pooling.





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2021–2022 ALA President
Chief Executive Officer, Flaherty
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“
The one thing I want to encourage you all to do is be kind and help one another as we continue our journey.”

The ALA Connection

Recently, I have had the opportunity to visit with a few statewide ALA retreats, and it reminded me of how important connections are to our ALA membership and to me personally.

As we draw closer to the end of my term and as I sat down to write my last column for *Legal Management* as ALA President, I found myself reflecting on the past year. I am seeing things return to normal little by little — as far as activities inside and outside of work go. People are getting together again. I think about friends we have lost to COVID-19, the increasing challenge of mental health issues, and the new global crisis that has emerged in Europe. It is a great deal to try to cope with while trying to take care of ourselves and others each day. The one thing I want to encourage you all to do is be kind and help one another as we continue our journey. Reach out to your friends and family and make sure they are OK. And, quite frankly, make sure to develop your own self-care plan.

Over the last month, I have been fortunate enough to attend and speak at several ALA in-person events across the country. The energy of ALA members and business partners being together again, some for the first time in two years, was incredible. The ability to meet and network in-person after being apart was visibly positive in so many ways. Meeting new people and seeing old friends again means so much, and it reminds me how important networking and education is to our ALA membership and to our self-care.

I find this incredibly significant, especially as it relates to one of ALA's strategic direction goals of more meaningful, accessible and personalized member value. These relationships we build and strengthen at retreats and conferences are what make us more interconnected and help energize us to keep moving forward.

The pandemic began two years ago, and it's been interesting how legal organizations have adapted to change faster than they had in the past — largely because of the necessity to continue to keep the doors open and take care of client needs. To keep up with these changes, we were able to rely on our networking and education from ALA to help lead our firms and our colleagues. Now it appears we are shifting to a different point in the pandemic, one that will open up more opportunities for us to resume in-person meetings, network with other legal management professionals and use more of the resources available to us through our ALA

membership. And we can keep building on ways to drive the strategic direction that ALA adopted last year, which focuses on member value; diversity, equity, inclusion and accessibility (DEIA); education and professional development; and influence in the industry.

I look forward to seeing everyone this May in Kissimmee, Florida, at the 2022 Annual Conference & Expo, where we will continue to build our network of support!



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JACK HERON
Product Manager
BigHand Pricing and Profitability

Law Firm Pricing and Budgeting Trends for Optimized Profitability

In August 2021, BigHand gathered 800 responses to an industry survey from senior legal finance professionals, managing partners and legal pricing managers in firms of over 100 lawyers in North America and the United Kingdom. The resulting report is an accurate view of the latest legal pricing and matter budgeting trends.

It confirms the extraordinary pace of change occurring within law firms and the rapid evolution towards real-time visibility of all matter pricing across the firm to enable individuals to take responsibility, deliver client value and maximize profitability.

The full report delves into these areas and more in detail, including:

- » The impact of the pandemic on billable hours, write-offs and profits per equity partner.
- » How law firms are responding, including the expansion of alternative fee arrangements (AFAs).
- » The state of law firm matter budgeting and tracking against actuals and its impact on the bottom line.
- » How people, process and technology are more important than ever as firms return to “normal” working patterns and plan for the next phase of growth.

STRATEGIC PRIORITIES TO MEET CLIENT NEEDS

During 2020, law firms had to provide an unprecedented level of support for clients, many of whom were facing huge operational challenges to survive.

“The report reveals a significant cultural shift throughout the industry to support the changes and increase the focus on profitability.”

“The entire firm has to be focused on the business, not the practice of law, to achieve real, sustainable improvements in profitability in an increasingly cost-squeezed market.”

- » 82% of firms confirmed they have experienced rising client demands for financial transparency.
- » Clients also want more AFAs, with respondents reporting an average increase of 27% in client demand for them since the pandemic began.

Firms have responded to client demands for more visibility and flexible pricing models:

- » 74% have introduced more mandated matter budgeting.
- » 46% now providing greater visibility of the pricing breakdown at the start of the matter.
- » 42% offer AFAs like fixed fees or capped fees.
- » 38% have introduced upfront billing or billing on milestones.
- » 34% have introduced extended payment terms.

However, 40% also feel compelled to offer discounted standard rates, flat discounts or early payment discounts — which will create new profitability challenges. Furthermore, while upfront improvements in pricing information are welcome, firms are not providing enough information throughout the matter process.

Less than 2% of firms provide updates on budget throughout the project life cycle on all matters. It suggests that firms are still constrained by a lack of processes and technology, and clients are being left in the dark over potential overruns, which in turn could damage client relationships.

With client demands placing ever greater pressures on matter budgeting and pricing to maintain profitability, it is now essential to introduce effective planning and tracking of costs.

CULTURE CHANGE

The report reveals a significant cultural shift throughout the industry to support the changes and increase the focus on profitability. Firms are making improvements to their matter pricing by ensuring the right people are in place, with the right training and remuneration.

- » 66% have hired new dedicated pricing resources in the last 18 months.
- » 25% plan to recruit a pricing specialist in the next two years.



- » 50% plan to introduce lawyer remuneration incentives or penalties based on reducing billing write-downs.
- » 24% plan to train lawyers in pricing practices.

However, pricing directors and teams cannot achieve significant change when working in isolation. The entire firm has to be focused on the business, not the practice of law, to achieve real, sustainable improvements in profitability in an increasingly cost-squeezed market.

There is also widespread recognition of the need for change and the availability of technology solutions to deliver accessible real-time information that can support far more effective pricing and profitability management:

- » 76% are planning to introduce a legal pricing solution in the next two years.
- » 86% of managing partners confirmed planned investment in dedicated pricing solutions in the next two years — underlining the senior level commitment to this investment.

For any pricing director targeted with driving significant improvements, this senior-level commitment to change is a huge advantage, overcoming many of the typical difficulties associated with achieving management buy-in to technology investment.

Law firms are now actively looking to support lawyers to achieve better financial outcomes with tools that provide data-driven budgets and costs, better resource plans, lower write-offs and clear client reporting. An investment in matter budgeting, pricing and tracking technology that is designed for law firms to manage their matters financially will play a key role in ensuring firms can keep profitability objectives on track.

Following a year when firms went above and beyond to support clients, expectations have risen — and that includes expectations that law firms will embrace digital technologies at the same rates as clients. Digital transformation has accelerated across the legal industry, and any divergence in digital maturity will be very evident to clients — and provides a foundation for continued innovation.

ABOUT THE AUTHOR

Jack Heron is the Product Manager for BigHand Pricing and Profitability. He is an experienced software product manager with a varied history working in the computer software industry. At BigHand, he is responsible for driving the development of pricing solution BigHand Pricing and Profitability, understanding and delivering on client needs for continued added value.

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MADELINE PARISI

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What Is ESG and Why Is It Important?

You know the individual words: Environmental. Social. Governance.

When used together, they describe the nonfinancial considerations a business makes in its operations. Environmental, social and governance (ESG) may be a familiar term in investment scenarios, but today’s media and culture have elevated the concepts of environs, sustainability, biases and oversight to a higher level of social consciousness. They have become critical business factors to stakeholders — including employees — and impact how organizations are managing operations.

According to a survey released in November 2021 by *Kiplinger’s Personal Finance* magazine in partnership with Domini Impact Investments, ESG investing is defined as “considering a company’s record on environmental practices, social issues and governance policies before investing.” It further states that 91% of Millennial investors say they are likely to add these investments to their portfolios soon, compared with 80% of Gen X investors and 68% of Baby Boomer investors. The survey also reported that overall, more than 70% of respondents say a company’s environmental practices, social issues management and governance policies are very or somewhat important to them when choosing investments.

WHO’S MONITORING ESG COMPLIANCE?

Currently there is no regulating entity for ESG compliance. There is no legislation or single process or program for disclosure and reporting.

The U.S. Securities and Exchange Commission (SEC), as of this writing, does not require reporting on ESG matters. Reporting through 2021 has been on a voluntary basis — with the exception of an SEC disclosure requirement for certain organizations, and in specific classifications, to report on issues relating to climate change.

“
Law firms will face the
same stakeholder scrutiny
as any other company for
how they address ESG.”

In early 2021, the SEC announced a Climate and ESG Task Force that will initially focus on identifying any “material gaps or misstatements in issuers’ disclosure of climate risks under existing rules.” The SEC also proposed ESG reporting on human capital, which has not moved forward as of this writing. Separately, the Financial Accounting Standards Board (FASB) is looking at revisions to its human capital reporting. Should the FASB approve revisions to its human capital reporting process, new metrics such as diversity, culture and turnover will be required data along with existing technical reporting.

“ESG is not a problem that can be addressed by any one group in an organization,” says Mark Thomas, CGEIT, CRISC, CDPSE, President of Escoute Consulting. “To accomplish a broad ESG agenda, multiple entities will need to work in collaboration with legal and regulatory teams to establish an accountable and transparent system and supply chain for ESG.”

ESG impact is seen on a global scale, but currently there is not a single international authority in the ESG reporting and disclosure domain.

LAW FIRMS CANNOT AFFORD TO DISMISS ESG

The impact on law firms and firm clients will grow as media and stakeholders demand more from organizations. ESG is now becoming a critical business model. Frameworks will be developed and reporting requirements implemented and enforced.

“Because of the growing interest in ESG investing, clients will look to their legal counsel for guidance,” says Caren Shiozaki, CGEIT, CDPSE, CEDS, the Executive Vice President and Chief Information Officer for TMST, Inc. “This will include understanding evolving regulations, advice on how to structure new products, and how clients responsibly invest their own funds.”

Investment portfolios offered to law firm employees will also be analyzed, as employees want a voice in portfolio selection and more information and transparency about portfolios offered before they invest their own funds.

“Law firms will face the same stakeholder scrutiny as any other company for how they address ESG,” says Shiozaki. “The type of clients with which they work, the diversity of

firm partners, the social impact the firm has in communities — [these] are a few examples of how law firms will be viewed from an ESG lens.”

There is no turning back as stakeholders demand more from the organizations with which they conduct business and invest. Stakeholders are seeking greater sustainability and a long-term commitment to better governance.

Strategically, it will benefit organizations to begin considering how ESG will impact their business. Waiting for regulations and oversight directives means firms and firm clients will be reactive.

“Many organizations are launching their own internal ESG initiatives in response to internal and external pressures, and they do this without legal, regulatory or consumer mandates,” says Thomas. “This is a significant opportunity in the legal domain to be proactive in helping clients understand their options with respect to being an ESG-friendly organization.”

HAVE A VOICE IN THE SEC PROCESS

The SEC publishes all proposals for comment. If you or your firm is interested in having a voice in the process, offering metrics for consideration, sharing proactive steps your organization has already taken in this area, or learning about future proposals, visit sec.gov/rules/proposed.shtml.

ABOUT THE AUTHOR

Madeline Parisi started Madeline Parisi & Associates LLC (MPA) in 2013, providing business training solutions and training materials to organizations. With specialists in a variety of fields, MPA provides training content with a concentration in risk management, business resilience, audit and audit assessments, and cybersecurity. The company also provides in-person training.

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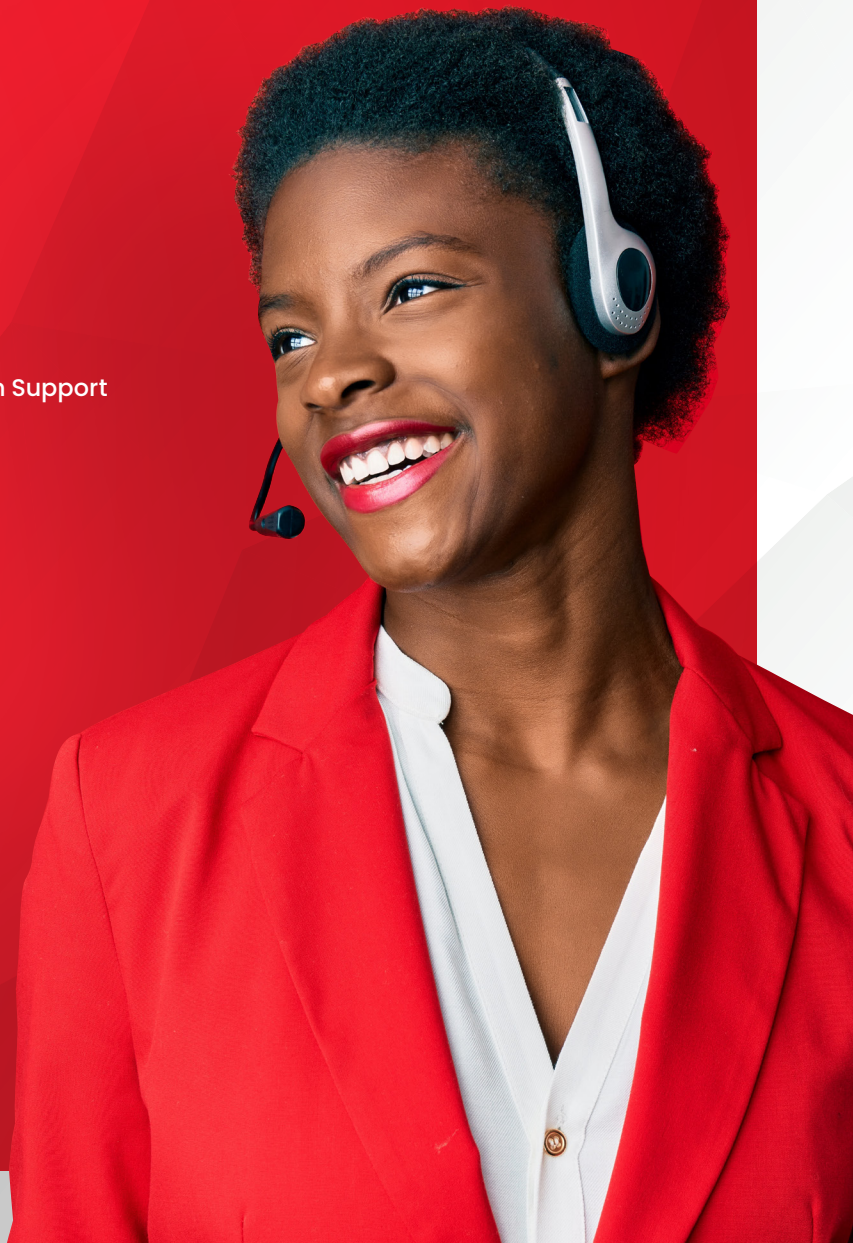
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ANDI SIMON, PhD

Founder and Chief Executive Officer
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Engaging with Empathy: How to Help Employees Through Challenges

As we reformat the new normal for the pandemic era, you may have wanted to tell your team, “It’s going to be fine. Cheer up!” Or perhaps you want to encourage someone to return to the office and think that the right directive is to say, “Don’t worry. You can manage it. We will all wear masks.”

Instead of causing your friend or colleague to feel better, your sympathetic comments may create a negative response in them. They walk away upset with you and feeling worse. You know that you want to help others feel they are being heard. You do care about them. But what should you say?

IT IS OK TO BE SYMPATHETIC, BUT BETTER TO SHOW EMPATHY

On a very simple level, sympathy involves the feeling of being sorry for someone but understanding from your own perspective. Empathy, on the other hand, involves putting yourself in the other person’s shoes and understanding why they may feel a particular way. The difference seems subtle, but it is key to saying the right thing at the right time.

If you fall into the sympathy trap (the “cheer up, it will be OK” conversation), you are expressing how you feel, but you sound like you are disregarding the seriousness of the person’s feelings.

Try *not* to say things that:

1. Change the subject.

When that problem turns into a conversation about how the Lakers did last night, you have deflected the conversation away from their concerns to another topic. It might make you more comfortable, but the other person is going to feel hurt and discounted, suggesting that you really didn’t care at all.

“Spoken with thoughtfulness, your words can help make a situation easier for someone who is struggling with pain, challenges, uncertainty and even mental health issues.”

2. Look for a silver lining.

“At least we didn’t lose the entire account” sounds like it might be a good comment after a bad situation. Your instinct is to provide optimism. Or perhaps you compare this event to that of another person and say, “Allen lost the entire case.”

But a silver lining makes the person you are trying to support believe they have no right to feel the way they do. Moreover, comparing your colleague’s situation with another person’s might sound fine, as if this is all a norm-referenced world. But you are diminishing their pain relative to someone else’s.

3. Dismiss their pain.

“Forget about it,” “cheer up” or “smile” are not statements you should think or say. You should not tell them to calm down or say they are overanalyzing the situation.

When you say this, it sounds like you don’t think it is such a big deal, which makes them feel worse. You are telling them that they are making it into something bigger than it is. Perhaps you are right — they may be brooding over something that to you is not worth their time and energy. But to them it is a big deal. When you dismiss it, you are acting as if you don’t care about their feelings or them as a person. Their experience is less real to you.

What should you say?

EMPATHETIC CONVERSATIONS MATTER THE MOST

Here is where that empathy training becomes essential. Spoken with thoughtfulness, your words can help make a situation easier for someone who is struggling with pain, challenges, uncertainty and even mental health issues. When someone shares something difficult with you, they are looking for you to support them, not cheer them up.

Here are some things to consider:

1. Keep it in their zone, not yours.

Begin by affirming your appreciation for their trust in you. Try saying, “Thank you for sharing your pain with me. It means a lot to me that you trust me.” Recognize their courage and vulnerability. Share your understanding that choosing you as a confidante is very important to you. Then ask how you can be of help. You “feel their pain.” How can they use your support? Reaffirm that it will stay in your complete confidence, not become a topic for gossip.

2. Ask for clarification.

Before you jump in with ideas or help, make sure they can clarify what is really bothering them. It’s difficult to be of help when things are unclear to them and to you. Be an interested inquirer, not a person with ideas ready to suggest to them, whether they are the right ones or not. Try to restate the problem. “So this is what I hear you saying. This is why you are feeling so frustrated or depressed.” As you restate the reasons for why they are feeling as they do, they can hear your sincerity and concern.

3. Boost their self-worth and character.

Try to point out their courage. Emphasize their personal strength in dealing with complex problems, be they in the workplace or in their personal life. Help them understand that they have shown a lot of talent and strong character in the past. Encourage them to see their own power in overcoming what they are going through. Don’t diminish their pain or the problem. This is a time to recognize their ability to cope with it and overcome the difficulties.



CONVEYING THAT YOU CARE

Think carefully and then tell them that you understand. Ask what you can do to be of help. Assure them that you are here when they need you. “What is it we can do together to help find the right solution?” might be a great approach to build on their trust.

If you see your efforts to comfort others backfiring, pause and regroup. While you think you are saying the right thing when you urge someone to “cheer up,” those words trigger negative responses — not hope. It takes a remarkably simplistic understanding of the mind to believe that you can simply issue commands — “feel better!” — and expect it to oblige. Hope creates positive mental energy but comes from actions that engage the person, not directives told to that person. Focus on how to engage, embrace, empathize. Watch and see your caring efforts turn into help for others.

ABOUT THE AUTHOR

Andi Simon, PhD, author of *Rethink: Smashing the Myths of Women in Business*, is an international leader in the emerging field of corporate anthropology and Founder and Chief Executive Officer of Simon Associates Management Consultants. A trained practitioner in Blue Ocean Strategy®, Simon has conducted over 400 workshops and speeches on the topic, as well as consulted with a wide range of clients across the globe. She also is the author of the award-winning book *On the Brink: A Fresh Lens to Take Your Business to New Heights*. Simon has a successful podcast, *On the Brink with Andi Simon*.

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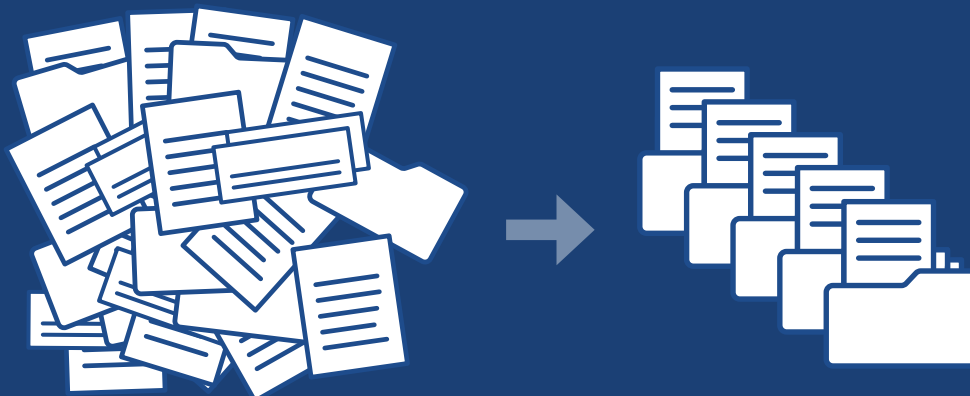
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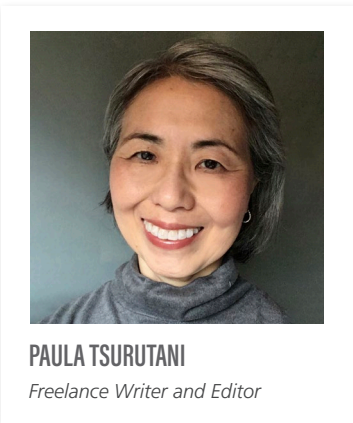
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“Management works hard to make sure we are connecting and listening to staff, reviewing salary benchmarks, offering professional development training, and making a concerted effort to include our support team during the hiring process.”

The Big Quit

How to keep the Great Resignation from visiting your firm.

There’s an exodus happening in many workplaces. According to the most recently released U.S. Department of Labor data, workers are walking away from their jobs, voluntarily, in record numbers. In November 2021, more than 4.5 million people joined the Great Resignation, re-evaluating their careers and searching for different opportunities.

This trend is reflected within legal as well. Within the legal profession, the 2022 Report on the State of the Legal Market from the Thomson Reuters Institute and the Georgetown Law Center found that associate turnover reached a worrying 23.2% on a rolling, 12-month basis through November 2021. With more workers deciding to leave their positions — spurred in large part by the pandemic — law firms are rethinking their strategies, policies and benefits to adjust to and navigate this trend. And they are redoubling efforts to create a culture that helps recruit and retain top-performing lawyers and staff as the work landscape continues to evolve.

Here’s a look at what some firms are doing to make sure the Great Resignation doesn’t reach their doorsteps.

HIRING INCENTIVES

Recruiting lawyers and staff during the pandemic presents a range of challenges and solutions. To be competitive, one Canadian firm reintroduced signing bonuses for lawyers, an incentive it hadn’t used for a number of years.

Meanwhile, Holzer Patel Drennan offers flexible billable hours for an adjustable compensation structure, gap insurance to assist with medical insurance deductibles and paid parental leave. Importantly, the firm also focuses attention on its current staff.

“Our best advertisement is the happiness of our team,” says Firm Manager Terri Moore-Natal, SPHR. “Management works hard to make sure we are connecting and listening to staff, reviewing salary benchmarks, offering professional development training and making a concerted effort to include our support team during the hiring process.”

WORKPLACE FLEXIBILITY

The last two years have proven that for many, operations can run just as smoothly with employees working from home. And this flexibility is not something employees are willing to give up. A February report from Pew Research Center found that 64% of respondents say working from home has made it easier to balance work and personal life.

Instituting more flexible work arrangements is a key factor in retaining a happier workforce. But the range of flexibility differs widely among firms.

As a perk, workplace flexibility continues to be at the top of the list for both lawyers and staff, notes Lynn Iding, CPHR, CCIP, Director of Human Resources at Stewart McKelvey. “Some enjoy the ability to work from home. Others are itching to get back to the office.”

At Holzer Patel Drennan, the firm has instituted “flexible work hours to accommodate early birds, night owls and those who want to work fewer than a 40-hour work week,” says Moore-Natal. The firm encourages but does not require in-office attendance, except for essential personnel. For those opting to work at home, the firm has provided sit/stand desks and additional monitors, moved everyone to laptops, and offered additional accessories as needed. It’s duplicated the setup for those who are in the office regularly.

ENCOURAGING HEALTH AND WELLNESS

Even with flexible work arrangements, remote and hybrid work can be extremely isolating for some employees, resulting in lower morale and a diminished sense of community. Even with a 300% increase in mental health benefits, one firm employee (who requests to remain anonymous) reports that “our morale has suffered due to COVID and a remote work environment. When we are working in-person, we all benefit from regular get-togethers. Office-wide luncheons, office-wide breakfasts on certain occasions — these gatherings are really, really missed!”

To address the sense of isolation, collaboration tools like Slack and Microsoft Teams, though not ideal, have been a positive resource, providing daily contact with colleagues. Regular



remote coffee chats, virtual activities like cooking lessons, and frequent internal communications — including revamped newsletters and intranet resources with health and wellness articles and staff profiles — also have helped bolster firm culture and connectedness.

O’Melveny & Myers LLP wanted to find ways for employees to remain active, too. They joined forces with Peloton, making it the first law firm to extend Peloton Corporate Wellness offerings to its lawyers and staff. Through this arrangement, all U.S.-based O’Melveny employees receive free access to a Peloton digital membership or subsidized pricing for an all-access membership, as well as preferred pricing on the Peloton Bike and Bike+.

“O’Melveny has always been a firm focused on well-being, where our people can grow as professionals and be the healthiest versions of themselves. The pandemic has made our commitment to well-being even more crucial,” says Chief Operating Officer George C. Demos, who also chairs the firm’s Living Well Committee. In the first full month of the program, Demos says the staff took over 1,800 classes. “I’m thrilled that our lawyers and staff are making space in their days to take care of their health and well-being.”

RETHINKING YOUR INTEGRATION AND PROFESSIONAL DEVELOPMENT STRATEGY

The State of the Legal Market report underscored the need for firms to acknowledge and address the life-changing experiences that attorneys and staff have endured during the pandemic, take steps to reexamine all firm operations and activities, and “remember that what emerges in this process will be different from what firms had in place before.”

An expanded menu of benefits and perks, while helpful, is not enough if firms want to recruit and retain top performers. This is a moment where firm leadership can take a fresh and longer-term look at their talent strategy. The pandemic, while continuing to challenge management, offers a unique opportunity to assess how to best support lawyers and staff at every level, says Julia Mercier, Founder of Mercier Talent Solutions. “Having a talent strategy rooted in the firm’s culture, challenges and goals is the key. [The strategy needs to be holistic], engaging high performers by providing mentoring, sponsorship and other opportunities.”

Remote hiring and hybrid work likely will continue — making initial onboarding, integration, mentoring and leadership development more important than ever. Iding says firm management needs to place much more focus on change management and process improvement to accommodate remote work.

Mercier agrees. “Some associates are working with partners and staff they have never met in person. They don’t have the benefit of a preexisting relationship built on experience and

trust. Leaders can play a key role by making sure local partners and senior staff have a plan to integrate new hires.”

Executing a strategy to counter the Big Quit also will require management flexibility and transparency, as well as a renewed emphasis on clear and authentic communications.

“My goal is to have the very best people doing the very best for our clients and each other,” says Moore-Natal. “That only happens by getting to know your team and engaging with them regularly — whether it’s meeting about what is or isn’t going well or just a quick hello about a book, movie or podcast. Frequent feedback and follow-through is the best advice I can give to other law firm administrators.”

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MARY KATE SHERIDAN, ESQ.
 Writer, Editor and Lawyer

8 Tips for Creating Effective Modern Legal Assistant Pools

Changes in the legal profession have made it vital to take a dynamic, thoughtful approach to legal assistant pooling.

Many law firms have moved toward a pooling model for legal assistants in recent years. But creating an effective legal assistant pool requires much more than simply offering access to a group of assistants. And crafting a pool that best serves all your lawyers can be quite challenging.

“Firms that put in the legwork to gauge their administrative support needs and the range of skills available in the pool can better plan workloads and assignments.”

Indeed, in a 2020 survey conducted by ALA and BigHand, a significant number of respondents noted the difficulty in supporting their multigenerational lawyers: 60% of respondents submitted a score of 7 or more out of 10 (with 10 being “extremely difficult”) with regard to satisfying the support needs of multiple generations of attorneys.

In addition, any modern assistant pool must evolve along with the ever-changing reality resulting from the pandemic.

The demands of serving a group of lawyers with varying expectations plus pandemic-influenced changes in the legal profession have made it more important than ever to take a dynamic, thoughtful approach to legal assistant pooling. Read on for eight ways to maximize your legal assistant pools to meet the needs of your lawyers and support staff.

1. UNDERSTAND THE KEY STAKEHOLDERS

Planning is key to shaping effective legal assistant pools, and legal managers should take a step back and assess the various stakeholders.

“With assistant pooling especially, you need to understand what everyone’s skills are, what the job entails and what everyone’s expectations are so you can manage the workflow,” says Connie Dunn, Legal Operations Manager at Lexicon, a legal services and technology provider.

“Assessing the stakeholders’ skills and support needs isn’t something that should occur solely while planning for the assistant pool. Firms should continue to analyze the unique needs and evolving skill sets available.”

Firms that put in the legwork to gauge their administrative support needs and the range of skills available in the pool can better plan workloads and assignments.

“To the extent you can, spend time with the attorneys in advance to understand how they work, what kind of work they need help with, or where they feel they were getting the best support prior to this,” says Jean Durling, Chief Talent Officer at Fox Rothschild.

Fox Rothschild recently launched Fox Pro Teams, which takes a two-pronged approach to meeting lawyers’ administrative needs. More than 400 of the firm’s lawyers are assigned to the Attorney Resource Center (ARC), which includes nearly 40 specialists working in a pooled model. The firm also offers Client Service Teams, through which a group of lawyers — mostly partners — is paired with one client service specialist, similar to the more traditional legal assistant model. As part of this rollout, the firm has strived to stay attuned to both the skills in the pool and the lawyers’ support needs.

“Our objective is to make sure the right resources are working on the right projects — that we’re leveraging people’s knowledge skills to be able to perform at their highest level to be able to perform for the people we support,” says Denise Dellaratta, Director of Practice Support at Fox Rothschild.

Of course, assessing the stakeholders’ skills and support needs isn’t something that should occur solely while planning for the assistant pool. Firms should continue to analyze the unique needs and evolving skill sets available.

Molly L. McGrath, Founder of Hiring and Empowering Solutions, LLC, recommends that firms have weekly meetings during which they assess caseloads, determine where lawyers need additional support, and attempt to anticipate where lawyers will need support in the future. These steps create a more team-centered approach and help firms to better plan and staff their matters.

2. EMBRACE HYBRID SKILL SETS

For the most part, the days of legal assistants taking dictation and logging hours are long gone. Today’s modern legal assistant boasts a broad range of skills — so much so that even the title “legal assistant” no longer encapsulates what they bring to the table.

For example, in a recent survey of lawyers conducted by Robert Half, 50% of the legal support jobs at respondents’ organizations were blended paralegal/legal assistant positions.

“The assistants in these pools are hybrids almost 100% of the time now; they are able to file and understand the court system, federal courts, legal rules, etc. — as well as assist,” says Dunn. “It’s a combination of skills that make these pools more successful.”

By understanding the evolving skill sets of their legal assistants, firms can better build efficiencies within their workflows. Moreover, the pool model offers a space for assistants to collaborate and combine their talents to best serve each attorney. A pool that offers diverse abilities is helpful both in terms of serving one attorney’s various needs and meeting the range of expectations based on an attorney’s seniority level and technological experience.

“We’ve seen it’s more of a blended group assisting the attorneys in these pools,” says Jamy Sullivan, Executive Director of the legal practice at Robert Half. “Anywhere from 30%–40% are truly clerical in nature. Increasingly, the firms are looking for individuals that are more trained to the level of a legal assistant, having junior paralegal capabilities. Some are even calling them ‘technical assistants’ or ‘practice assistants.’ It’s a blended model, so clerical work can be done at a lower cost, but there is an upskill with assistants who can help attorneys who can do so much more on their own.”

3. INVEST IN LEARNING

A legal assistant pool will only be as successful as the attention and resources allocated to it. The more skilled and efficient a firm’s support staff is, the more effective its attorneys will be.

“Invest in your people because often skill sets are varied, and you are inevitably going to have a less experienced assistant in your pool,” says Dunn. “Invest in each other and create an environment where they can learn.”

Once a firm understands its support needs, it can craft a training program that will strengthen the skills of the assistants in the pool and introduce development programs that are more specialized for legal assistants who focus on certain practices or types of work.

“At Fox Rothschild, we created learning paths with all of our ARC specialists, which include videos, one-on-one training and more, to make sure each user was getting exactly what they needed to fill in the gaps,” says Dellaratta. “We also broke off the ARC specialists into subgroups. The final piece is the team created this amazing onboarding process, which takes a new ARC specialist through the life cycle of training as they onboard through.”

4. FOSTER TEAMWORK

While the traditional legal assistant role may have been somewhat siloed and independent in nature, the pooled model provides an opportunity for teamwork and camaraderie.

“Employees want to have their own tribe,” says McGrath. “They want to have colleagues that they collaborate and work with.”

McGrath suggests that legal managers foster such collaboration within the assistant pool through weekly meetings, coaching opportunities and learning centers. Building a cohesive and communicative team will not only promote collaboration on matters but also allow for further growth as team members learn from one another and their assignments.

5. PRIORITIZE BUY-IN AND COMMUNICATION

Firms may face various responses when moving toward a modernized pool, including resistance from more senior lawyers who are accustomed to the traditional legal assistant model as well from more tech-savvy attorneys who question the need for support. The keys to reaching these and other groups within the firm are strong communication and buy-in from the top.

“Communicate,” says Dellaratta. “There’s no such thing as overcommunication — engaging your stakeholders and understanding what people need and what they think they want in this alternate universe that doesn’t exist yet is critical.”

Strong communication goes hand-in-hand with support from the top down. When the messaging comes from the highest levels of the firm — or is at least supported by those at the top — it creates stronger buy-in for the pool model.

For Durling, advance planning and ironing out the details of Fox Pro Teams before presenting it to leadership was useful.

“I think because the team did so much of the initial prep and work and had the structure pretty well outlined, the process for approval was easier,” says Durling. “The implications both from a staffing perspective and a financial perspective, what the steps would be, and how we would approach it were planned in advance and presented to our managing partner

“Moving to a pooled assistant setup — or revamping your current pool setup — can be a big adjustment, and firms should prepare for the ups and downs. Be open to making changes over time to maximize the setup for your firm.”

and leadership, and they were on board. From there, we knew we had their support.”

6. CREATE A CULTURE OF SUPPORT

Buy-in from the top is important, but it is just as critical to have buy-in from the firm’s associates. One potential roadblock is that many newer lawyers will forgo administrative support and handle the tasks themselves because they don’t feel the help is meant for them and their level of tech savvy. By communicating the value of the assistant pool and encouraging lawyers to engage with the pool, firms can create a culture of administrative support.

“I think firms should consider assigning legal administrative assistants to these younger attorneys working in these chaotic law firms because they can really help them,” says Sarah Ruttan Bates, Lexicon’s Director of Legal Operations and Training. “The support from the secretarial pools can really truly help mold that attorney in how they practice and ensure they’re not drowning.”



7. BE FLEXIBLE

Moving to a pooled assistant setup — or revamping your current pool setup — can be a big adjustment, and firms should prepare for the ups and downs. Be open to making changes over time to maximize the setup for your firm.

“Being able to be creative and fluid with your model and knowing the first model you attempt or the first centralized point you attempt should be able to evolve is important for success,” says Sullivan, who recommends surveying associates for feedback on how the pool model is working. “Progressive thinking seems to be a best practice to set up the right model for you and your firm and practice group — it’s not a one-size-fits-all.”

8. BE FORWARD-THINKING

The pandemic has launched the legal world into a new reality, and firms should be nimble when navigating legal assistant pools — especially when it comes to virtual work. While administrative support has typically been seen as an in-office service, more firms are embracing virtual or hybrid setups for their legal assistants.

In fact, a 2020 survey conducted by Sandpiper Partners LLC found that 58% of respondents are considering virtualizing secretarial support.

And secretarial pools complement the virtual model well because they offer a centralized point of reference to evaluate how the setup is working for the firm as a whole.

“Having a centralized point really does allow a firm to be more business-savvy and be more forward-thinking,” says Sullivan.

Recent years have also seen a greater demand for virtual or hybrid work schedules, while the competition to hire and retain talent has become steep.

“If you’re not forward-thinking and not going to offer remote flexible work schedules, you will be challenged in attracting the talent and also retaining the talent,” says McGrath, who also notes that remote work has enabled legal assistants to work even more efficiently because they don’t have the constant interruptions that fall on support teams within the office.

Firm leaders and legal managers should keep an open mind about the structure of the legal assistant pool and which setups will bring the most efficiency and best nurture the firm culture.

Creating a legal assistant pool model that aligns with your firm’s needs and the realities of modern lawyering can yield myriad benefits. Develop a plan, communicate, assess and keep an open mind.

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Mary Kate Sheridan, Esq., is a lawyer, writer and editor. She received her JD from Columbia Law School, MFA in Creative Writing from The New School, and bachelor’s in English from Mary Washington College. She previously worked as a litigator at a Vault100 firm.


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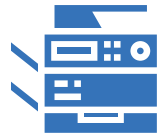


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“Keep in mind that racism and gender inequality are systemic issues and that these issues haven’t suddenly gone away during the pandemic, but rather now manifest themselves in different ways.”

When Pandemic Effects Are Disproportionate, How Do We Move Forward?

We look at how legal organizations are continuing to address diversity, equity, inclusion and accessibility in the aftermath.

Calls for diversity in legal — often considered one of the least diverse professions — are nothing new. As recently as 2015, the *Fordham Law Review* published an extensive report outlining ways firms can put the statements about diversity, equity, inclusion and accessibility (DEIA) they have on their websites into actual practice.

Whether things have progressed much from that study is debatable. The switch to remote work precipitated by the pandemic has been beneficial and welcome to many, but pandemic-influenced changes have also had disproportionately negative effects on some groups. In 2021, ABA released a special report, “Practicing Law in the Pandemic and Moving Forward,” that noted: “Although the transition to remote work has affected all lawyers, the survey found it has had a disproportionate impact on women lawyers with children and lawyers of color.”

“Since the inception of the coronavirus into the U.S., firms have had to turn their attention to so many issues that they have never before had to focus on — like significant remote work, vaccinations, mask mandates — I would imagine those things have diverted some attention away from many different initiatives, including those focused on diversity,” says Michael S. Cohen, Partner at Duane Morris.

The pandemic has been increasingly difficult for people of color and women in a multitude of ways. For instance, research shows that during the pandemic, women with

“The pandemic has been increasingly difficult for people of color and women in a multitude of ways.”

children have been more likely to have had increased childcare responsibilities and disruptions to their work and professional careers than men, notes Ellen Rosenstiel, SHRM-SCP, Chair of ALA’s DEIA Committee.

“Add to that the additional surge of social unrest triggered by the murder of George Floyd in 2020 and continuing through the insurrection at the U.S. Capitol in early 2021. These events have affected many employees in ways that cannot simply be left behind when work begins,” says Rosenstiel, who works as the Director of HR, Employment and Employee Relations at Kutak Rock LLP. “[This] is especially true for Black employees. Simultaneously, we are expecting these professionals to show up at work with the same level of energy and availability as those who weren’t as personally or emotionally affected.”

Keep in mind that racism and gender inequality are systemic issues, notes Rosenstiel, and that these issues haven’t suddenly gone away during the pandemic, but rather now manifest themselves in different ways. “Law firms that had worked to put tactics in place pre-pandemic to minimize or eliminate oppressive systems haven’t necessarily flexed to the current pandemic, hybrid/remote environment to identify new oppressive systems and what adaptations might be required address them,” she says.

So how are legal organizations keeping up the momentum on DEIA efforts within this new work environment?

WORDS INTO ACTION

Up until the flash point of the George Floyd murder, diversity was in theory an issue being addressed in firms, says Rosenstiel. But those events brought about an interesting turn: “Some law firms made statements denouncing racism. But I don’t know that people want to hear about statements, right? They want to see results. They want to see a different workforce and a fair makeup of our workforce.”

At minimum, firms should continue to offer training in conscious and unconscious bias and focus on providing a supportive, engaged work environment that provides comprehensive plans for sick and family leave, as well as subsidies for childcare, family care and tutoring.

They also should be more mindful that mentoring and sponsorship programs likely need a different approach as

work patterns shift. “[These programs] certainly require much more intentionality in order to best support and provide equal opportunities to women and people of color in a much more complicated hybrid/remote work environment,” says Rosenstiel. “Our marginalized communities — who often feel they have to mask their authentic selves to get equal opportunities — have even less opportunity to do this in remote work and often expose themselves to even greater discrimination and microaggressions than when in they were in the workplace.”

ALA’s DEIA Committee is working revamping its mentoring and sponsorship guide so that law firms that don’t have DEIA procedures in place can get the resources they need to get started. It’ll be a resource to help employers create a pathway for more diverse potential employees, says Rosenstiel, whether they’re lawyers or professional staff or management staff.

While bringing diversity to forefront wasn’t new for Nelson Mullins, the events of 2020 made the firm recognize that they wanted to expand their efforts even more, says Partner Deborah St. Lawrence Thompson, who also serves as Chair of the firm’s Diversity, Equity & Inclusion Committee. “The firm decided that we needed to really have someone whose sole focus, at a senior management level, is to broaden our platforms.” That included focusing on equitable development and growth, along with diversity.

That led to Katerina Taylor joining Nelson Mullins in 2021 as its Director of Diversity, Equity and Inclusion. “Obviously, there are things we have to re-shift [in order] for people to think from a different perspective. And that does take time to sit down and actually listen to people and hear how change impacts everybody. Because nobody necessarily likes change,” says Taylor.



“Depending on the size of your firm, if you are in HR, as I am, or you’re an administrator or you’re a manager of any kind, you’re involved in hiring, in the delegation of work and how staff are treated. You have to find your voice and speak up for people who don’t always have that same voice,” Rosenstiel says. “Admins should review their firm’s hiring practices and ask, ‘How do we do more outreach and expand who we’re recruiting today?’”

The work — even though it can be uncomfortable at times — is worth doing. Kutak Rock has had roughly 175 individuals volunteer to participate in a book dialogue and discussion about antiracism and antibias. Though difficult, attendees learned about their own racist tendencies and how they can work to combat them, Rosenstiel says. They also learned how to implement “interrupters” to ensure everyone’s voice is heard and valued.

The firm has also applied procedures in their hiring process to help eliminate any unconscious biases driving those decisions. “Do we get it right all the time? No,” she admits. “But we recognize where we have weaknesses, and we keep trying to get better at it.” Rosenstiel adds that while the original program was intended to train executives, staffers at all levels quickly came on board. At the time of publication, there was a waitlist for the 2022 reinstatement of the program.

Taylor notes that with St. Lawrence Thompson as Nelson Mullin’s diversity leader, “We have really expanded and enhanced our affinity groups. How we communicate. We have a newsletter that highlights all of our diverse attorneys, our cultures. We talk about rising stars. And that is shared firmwide.”

Additionally, a teamwork approach to helping attorneys with disabilities at Nelson Mullins includes taking the legal administrative assistant’s perspective, she notes. “There could be challenges for the admin that we have to make sure we address. It could be, ‘Oh, this attorney needed more time, so this admin’s going to have to have potentially more overtime.’”

IT TAKES A TEAM

Legal managers have an incredible opportunity to move these policies forward. “I think it’s equally incumbent upon people in those positions to approach leadership with ideas that they see as ways to improve the firm,” says Cohen. “It sounds hokey, but it’s true. Firms, they’re teams. None of us works in isolation.”

To enhance knowing which administrators (and others) need help, Taylor attends group meetings and emphasizes that her

“I think it’s equally incumbent upon people in [legal management] positions to approach leadership with ideas that they see as ways to improve the firm.”

door is always open for conversation. “When they feel like they either have experienced or [they] have a little bit of anxiety about something that might have happened, they can come to me. And whether I take it to HR or whether I take it to their direct report, there’s an open line of communication.”

While there has been incremental progress on DEIA measures overall, the legal industry has remained very slow to change. “Sadly, I think the time our workforces are reflective of our communities [will] probably [be] well beyond my lifetime,” Rosenstiel says. “You sometimes don’t feel like you have any big wins in this area, but you hope that you’ve made progress.”

“The reality is that firms that are ignoring these ideas, that don’t understand or appreciate the importance of these concepts, are going to lag in the long run,” says Cohen. “Put the human piece of this aside. (Which of course is of paramount importance.) Firms that are not paying attention likely will miss opportunities to make themselves successful.”



ALA MAINTAINS BROAD OUTREACH

ALA has been addressing inclusion issues for 20 years to better understand and respect diversity — including areas beyond race, sexuality, age and more typical outreach. Visit alanet.org/resources/diversity to check out available resources.

ABOUT THE AUTHOR

Wendy J. Meyeroff the Ghostwriter Who Grabs Attention, has been a reporter for numerous trade magazines for over 20 years, as well as a marketing consultant for numerous industry leaders.

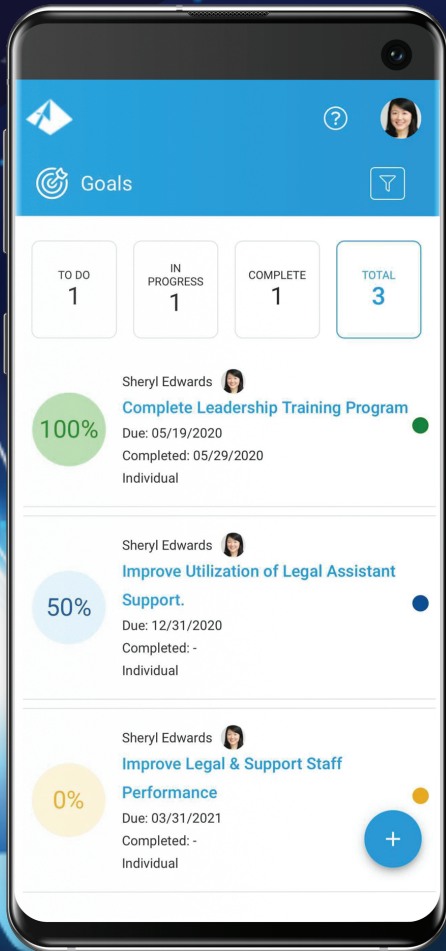
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“Putting best practices into place with this new system allows us to consolidate, access and review information in a more organized way.”

Lessons Learned from a Complete E-Discovery Digital Transformation

Transforming the digital processes surrounding a law firm’s platform for the review and production of electronically stored information (ESI) is no easy feat. That task is particularly difficult when coupled with the onset of a global pandemic and its myriad challenges.

But Berger Montague successfully tackled this endeavor, completely streamlining its legal e-discovery processes between March and October 2020. Today, more than 100 of the firm’s internal team members and numerous attorneys at 25 co-counsel and partner counsel firms use the new e-discovery system to serve vital client litigation needs.

Before the transition, the firm used its own product to house most of the ESI reviewed and produced in connection with its cases. The rest of the litigation materials were hosted on various other e-discovery platforms. This structure became outmoded, especially as it was incompatible with what co-counsel and others in the industry were using.

That said, it’s a major transformative process to move a massive amount of firm data from proprietary and disparate systems to a new single system. Not only can it be costly, but there are also concerns about liability, potential loss of data, inability to access data during in the conversion process, time investment, and potential resistance to change from users. It can also be challenging with team members working from home offices for the first time in their careers, which adds another layer of complexity.



LESSONS LEARNED

When starting your extensive search, it's imperative to look for a product that meets both the firm's and co-counsel's exacting requirements for security, cost, standardization and quality. Search for a solution that can house the majority of the firm's ESI in a single space and, most importantly, a system that provides the security the firm needs to ensure client data and other sensitive information stays confidential and secure.

Here are some things we learned along the way:

- Assemble the right team.** You and your co-counsel will still need access to materials on your existing system to litigate cases while converting to the new one, so make sure you choose team members who can rebuild and refuel the airplane while you're flying it. For us, that included a dedicated project manager to guide the implementation process.
- Shore up support.** Appoint and train team member advocates to educate your internal team — as well as co-counsel and partner counsel — on the value of the new system and how to use it effectively. Appoint knowledgeable team member advocates for both the conversion and the implementation of the new product to help train users. Also, employ experienced training consultants.
- Planning and commitment are key.** The change associated with this type of complete digital overhaul can be overwhelming at any time. But rolling out the implementation during the pandemic was doubly difficult — users were already inundated with pandemic-induced changes. The real lesson is that there are always reasons not to make a change, including the ongoing rush of business and fear of the unknown. The remedy is to do as much planning in advance as possible and to make a commitment to change.
- Meet users where they are.** Everyone acclimates and embraces new technology at their own pace. Consider offering multiple training sessions tailored to specific comfort and ability levels with the new system to ensure education effectively meets user need and encourages adoption.

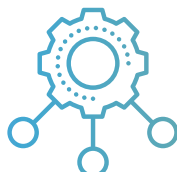
- Contract where you can.** During the implementation, you may need an e-discovery manager to handle the systems daily. Ultimately, you can negotiate a contract with your vendor to serve that function for your firm, rather than trying to hire for those services on your own.
- Check in regularly.** Keep in mind that a digital transformation of a vital service is an ongoing process. Check in with users often, offer refresher training, watch for patterns in user concerns and requests, and make updates as needed. A digital transformation is a living process that should evolve and grow along with your business needs.

Taking on such an intricate process may seem formidable at first, but don't let the size or presumed difficulty of the project dissuade you from engaging in or implementing it. In the end, Berger Montague's new e-discovery system has increased staff's mindfulness about how to handle electronic data most effectively. It's also raised awareness of the protocols for and downstream effects of each action they take as it relates to the storage, access to and security for this information.

But the biggest benefit is increased efficiency. Everything is faster and more streamlined. Putting best practices into place with this new system has allowed us to consolidate, access and review information in a more organized way. It saves both time and money, which ultimately helps serve clients better.

ABOUT THE AUTHOR

Eric L. Cramer is Chairman of Berger Montague, a complex litigation law firm headquartered in Philadelphia, Pennsylvania, with offices in Minneapolis, Minnesota; Washington, D.C.; and San Diego, California. He has a national practice in the field of complex litigation, primarily in antitrust. In 2021, *Chambers & Partners* ranked Cramer in the top tier nationally in antitrust. He's a frequent speaker at antitrust- and litigation-related conferences and a leader of multiple nonprofit advocacy groups.





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How an Internal Focus Fosters Growth

During these past two years, a key learning point at Ball Janik LLP centered around our culture — including how to connect our Oregon and Florida teams. We wanted to be proactive about creating a healthier and more sustainable work environment.

Reflection in a time of constant change and expansion was not easy, but as the workplace was evolving, we knew it was time to make key adjustments to stimulate growth, enhance our culture and recruit top talent. But the old way of doing business is no longer sustainable, as evidenced in the national workforce’s Great Resignation. We wanted to share what we’ve learned with our ALA community in the hopes it’ll help you navigate this new normal.

LOOKING INWARD

The pandemic has affected companies in several ways. One positive change was more time spent focusing internally.

First, we needed to examine our company culture and acknowledge that burnout is a risk all our people face. We are in an industry where working long hours and taking minimal paid time off (PTO) is the status quo. The stress — which is already part of our professional landscape — was only amplified by working remotely. Using the resources provided by ALA, including *Legal Management* and virtual events, we took a step back to identify key areas that needed improvement to support our employees’ needs.

With the help of our employees, we recognized early that the main focus needed to be creating a better work environment that centered around well-being and incorporating physical health, fitness and mental health. We solicited employee feedback about where we could make improvements. With everyone dealing with many firsts, we encouraged conversations that zeroed in on inclusive and innovative ideas. Additionally, we

“Reflection in a time of constant change and expansion was not easy, but as the workplace was evolving, we knew it was time to make key adjustments to stimulate growth, enhance our culture and recruit top talent.”

established a collaborative and inclusive Women’s Leadership Initiative that continues to grow and support our female attorneys. Mental health remains a priority, and we continue to explore alternative mental health services to meet the changing needs of our team.

We also seized this opportunity to build a proprietary customer relationship management (CRM) system to centralize data and implement artificial intelligence (AI) and automation to track success and better serve our clients. This CRM will provide vital feedback and improve efficiency by alleviating some of the tedious tasks that are distracting, rather than motivating, for staff. Aligning our values and corporate goals through new technology across all our business units is a shift that has shown to have a huge impact, and this will remain a focal point as we move forward. These pillars of strength will help us stay focused on the most important initiatives and attract high-caliber talent who share our ethos for execution and success.

Our evolved vision has also been applied to our physical space, with the redesign of the Portland headquarters. It now features an open-concept design without corner offices for a more inclusive and collaborative environment.

It is difficult to track the success of these new initiatives on a profits and loss statement, but that doesn’t mean they aren’t

important. Plus, looking at ways to better our staff’s lives is the right thing to do. Most telling is the fundamental change we have seen in our team, with an increase in productivity, quality and consistency of work, as well as more sustained collaboration across all our regional staff.

We are moving forward with the knowledge that this culture shift is difficult at times. While we would like to say we nailed it on our first pass, that’s not the case. However, we remain focused on these changes as a core initiative of our firm. We have embraced the fact that “work norms” will continue to evolve — and so will we.

ABOUT THE AUTHORS

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

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**DEB KNUPP**

Managing Director
GrowthPlay

“
A recent study by the
Integrated Benefits
Institute indicates a 400%
increase in anxiety and
depression directly related
to COVID-19.”

The Shadow Pandemic: How Firm Staff Can Show Up for Struggling Employees

In the past two years, humans have had a collective moment when it comes to mental health and well-being. No person has been immune to the disruption, fear and insecurity that the COVID-19 pandemic has ignited. We regularly hear about the cost and consequences of isolation and loneliness. The increase during COVID is staggering: A recent study by the Integrated Benefits Institute indicates a 400% increase in anxiety and depression directly related to COVID-19.

As we enter its third year, we are beginning a new phase: the shadow pandemic. This term refers to the period of time when the trauma of COVID-19 gives way to a more “normal” return to life. Collectively, active and unaddressed mental health conditions like depression, anxiety, PTSD and addiction are projected by some to take more lives than the virus itself. Furthermore, mental health experts are suggesting the peak of the shadow pandemic will not occur until 2024.

It will be particularly difficult on younger employees. A recent McKinsey & Company article, “Addressing the unprecedented behavioral-health challenges facing Generation Z,” highlights the disproportionate impact of COVID-19 on younger people. (For reference, Gen Z represents those born between 1997 and 2012.) Among the most troubling statistics in the report is that Gen Z was two to three more times more likely than other generations to report thinking about, planning or attempting suicide in the 12-month period spanning late 2019 to late 2020. In October 2021, the American Academy of Pediatrics, the American Academy of Child and Adolescent Psychiatry and the Children’s Hospital Association declared a national emergency in children’s mental health, citing the serious toll of the pandemic on top of existing challenges.

While clearly Gen Z is not yet a majority of people who are employed or practicing in a law firm, consider the impact on every person who works in a law firm (and your clients) who has a loved one between the ages of 10 and 25.

The shadow pandemic *will* impact your legal organization if it hasn't already. So how can you prepare for it?

SHOWING UP

Jen Marr, Founder and Chief Executive Officer of Inspiring Comfort, and her team have been researching the mental health impact of trauma. Their data found organizations have a devastating "empathy to action gap" — 80% of people surveyed self-report that they can see when someone is struggling, yet less than 20% feel equipped to know what to say and do to show care to those in need.

"Most people don't show care because they don't know how to show care and fall prey to what we call 'the Awkward Zone.' We need to remember that empathy, sympathy, compassion are all emotions," Marr says. "What we need is intentional action, concrete skills, tools and strategies to show care and comfort to those suffering."

By comfort, Marr doesn't mean the cozy noun version. She means the verb comfort. Comfort is a resilient verb and is a tangible, teachable skill that people can use to "show up" for those in need.

Incidentally, *Showing Up* is the title of Marr's newest book. Backed by 10 years of research, *Showing Up* teaches people and organizations how to cultivate cultures of human care and connection. She says there are two layers to "the Awkward Zone." The first is a mindset barrier. It's activated when people know someone struggling but fail to act. The second layer is the responding barrier. Undoubtedly, we will encounter people we know to be struggling, but we may feel unsure about how to respond to them. The good news is behaviors like these can be identified and modified.

I immediately recognized my own experience with these barriers. Marr suggests the way through them is to simply show up — a set of tangible, concrete skills that help people

create environments of care and safety in response to our mental health crisis. Showing up is a conscious competence for social connection and human flourishing.

As law firms contemplate how best to inoculate their cultures from the negative consequences of the Great Resignation and proactively respond to the present-day tsunami of mental health challenges, consider the power of teaching your people how to show up and close the empathy to action gap. The world needs lawyers and the professional staff to be at their best so that clients and their extended networks are more positively impacted. When we know how to show up, we can help ourselves and others struggle less, heal faster and activate positive mindsets and behaviors.

CONTINUE THE CONVERSATION ON WELLNESS

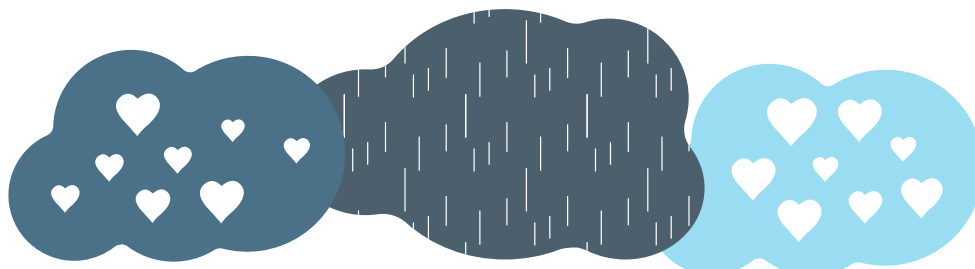
Join other ALA members at our upcoming Roundtable discussion on mental health. Register for the March 18 event at alanet.org/networking/virtual-member-meetups. Or read what others are saying on this vital topic at community.alanet.org.

ABOUT THE AUTHOR

Deb Knupp is a Managing Director of GrowthPlay, a consulting firm that helps law firms accelerate growth through the activation of exceptional revenue, client and talent experiences. For the past 30 years, she has worked extensively with leaders and professionals in the legal, accounting, financial services and manufacturing industries to align their people and business objectives to create cultures based on the principles of authenticity, accountability, and integrity. Knupp is also a passionate advocate in helping organizations and individuals bridge the "empathy to action gap" in mental health and well-being by engaging experts, education, resources, tools and best practices to elevate human flourishing.

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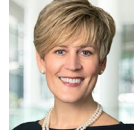


Anniversaries, Awards and Appointments

Members on the Move »



Chantilly C. Austin, a member of the Houston Chapter, is now Talent Services Manager at Greenberg Traurig, LLP, in Houston, Texas.



Heather L. Butler, a member of the Raleigh-Durham Chapter, is now Director of Administration at Ellis & Winters, LLP, in Raleigh, North Carolina.



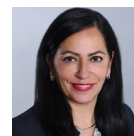
Jenna L. Carter, a member of the Capital Chapter, is now Director of Administration at Pillsbury Winthrop Shaw Pittman, LLP, in McLean, Virginia.



Heather M. Kurey, CLM, a member of the Capital Chapter, is now Office Administrator at Seyfarth Shaw LLP in Washington, D.C.



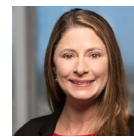
Freshta Maftoon, a member of the Golden Gate Chapter, is now Office Administrator at McGuireWoods LLP in San Francisco, California.



Santa Medina, a member of the New Jersey Chapter, is now Manager of Human Resources and Support Staff at Martin Clearwater & Bell LLP in New York, New York.



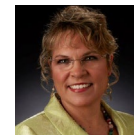
Amanda Teags, SHRM-CP, a member of the Mile High Chapter, is now Director of Administration at Moye White LLP in Denver, Colorado.



Tracy Tennyson, a member of the Suncoast Chapter, is now Office Administrator at Bradley Arant Boult Cummings LLP in Tampa, Florida.



Suzette Welling, CLM, a member of the Suncoast Chapter, is now Chief Administrative Officer at Bartlett Loeb Hinds & Thompson, PLLC, in Tampa, Florida.



Denise R. Wilson, SPHR, SHRM-SCP, a member of the Kentucky Chapter, is now Office Administrator at Sturgill Turner Barker & Moloney, PLLC, in Lexington, Kentucky.



Sending Our Condolences

ALA member Beth A. Meyer passed away in January at the age of 54. For 36 years, she worked for Baker & Daniels and its successor firm, Faegre Drinker Biddle & Reath LLP, in Fort Wayne, Indiana. She was the Office Administrator. Beth also served in the Indiana Air National Guard for 12 years. Contributions in her memory can be made to Humane Fort Wayne, Great Dane Rescue, Inc., or Riley Children’s Hospital. Our thoughts are with Beth’s family, friends and colleagues.

ALA is saddened to report that member Michelle Casares passed away in February. She worked at Lichter Law Firm for over 14 years, serving as the Office Manager. Michelle was also a Past President of the South Florida Chapter of ALA. She was deeply involved with the chapter for over a decade and was in the midst of her terms on the Website Committee and Business Partner Relations Committee. “Words do not do justice to describe the goodness that Michelle embodied, her unwavering dedication to her volunteer work associated with this chapter and how integral she was to the success of this organization over many years,” wrote Lilliana Torres, the current South Florida Chapter President. Our sympathies are with those who knew her.

What's Happening at Headquarters



CLM Exam Testing Window Extended

If you're taking the Certified Legal Manager (CLM)[®] exam soon, we have good news: We've extended the testing period for 2022 and 2023. The new windows for testing are:

-  **Spring 2022:** May 16–22
-  **Fall 2022:** November 1–7
-  **Spring 2023:** May 16–22
-  **Fall 2023:** November 14–20




Get complete details about the exam by visiting alanet.org/credentialing.

A Guide to Getting the Most Out of #ALAConf22

The latest LM Extra, “How to Get the Most from the ALA Annual Conference & Expo,” explains how preparation and planning is the key to getting the most out of your Annual Conference experience. Take the quiz at the end to see how ready you are for Kissimmee, Florida!

This year's conference will featuring fresh topics, tried-and-true essentials, new voices and interactive formats, there's no better opportunity to gain access to the latest industry information while reconnecting with your peers. Check out the program highlights:



-  **Keynote speaker Connie Podesta**, author of *10 Ways to Stand Out from the Crowd*, brings a blend of humor and insight for the new challenges ahead to kick-start the conference.
-  In sharing his dramatic story, **Brezina Memorial Session speaker Inky Johnson** will encourage you to harness your inner fortitude and empower you to embrace life's challenges on your road to fulfillment.
-  New this year! **Managing for Impact** is an immersive management development program dedicated to those responsible for supervising or managing others in the highly competitive world of legal firms. Loeb Leadership will guide participants through this in-depth workshop.

Download the full brochure for details of the varied and compelling lineup of speakers, presentations and opportunities to engage with your legal management community. **Advance registration pricing ends April 22.** Register today and save up to \$200.

Visit alanet.org/annual-conference for complete details.

Sign Up for The Successful Firm Project

Did you know ALA members and their entire firms can take advantage of a complimentary subscription for The Successful Firm Project? It's just another benefit of your ALA membership. These sessions provide a point of access for law firm leaders to connect and collaborate by sharing new ideas and best practices.

Here's a look at some of the upcoming Playbook Events:

- **March 22: How Successful Firms Approach Cybersecurity** will feature a panel of experts on improving data security across the enterprise.
- **April 12: Roadmap for How Successful Firms Source in 2022** will discuss how to work with providers to prioritize what you need and what will provide industry advantages.

See a detailed calendar at successfulfirm.com/calendar, and don't miss digital resources available throughout the website at successfulfirm.com/tools-topics.



Save the Date for the Chapter Leadership Institute

Over 60 ALA chapters will gather at Bally's in Las Vegas on July 15–16 for ALA's 2022 Chapter Leadership Institute (CLI). Join current and new chapter officers, individuals interested in becoming a chapter officer and ALA's Board of Directors and Chapter Resource Team to connect and share best practices for your chapter.

Whether you currently hold a volunteer role within your chapter or are considering it, look no further than this two-day educational event.

CLI will be held in the center of the action at Bally's Las Vegas Hotel, which offers everything from unique shows and an outdoor shopping plaza to a sparkling deep-end pool. The room rate at Bally's is just \$85/night plus resort fee and tax. Reservations will open soon.

Registration will also open soon! For complete details, visit alanet.org/cli. In the meantime, please contact customerservice@ALAconferences.org or call 1-888-593-7243 if you have any questions.

LFA Is Back for 2022

If you lead a large firm, the Large Firm Principal Administrators Retreat is a can't-miss. Equip yourself to lead the charge in your firm, drive change and fuel your firm's success. Join your peers for collaborative discussions and problem-solving forums tackling today's complex challenges.

ALA's 2022 Large Firm Principal Administrators Retreat will take place August 4–6 at the sophisticated Kimpton Hotel Born in downtown Denver, Colorado. Be there when legal management leaders from the country's largest law firms gather for a unique, peer-driven, collaborative experience.

Bookmark the Large Firm Principal Administrators Retreat page at alanet.org/lfaretreat to stay on top of event happenings. If you have any questions, please contact us via email at info@alaannualconf.org or call 1-888-593-7243.

