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The Softer Side of Succession Planning

Navigating firm members' feelings about retirement can require a nuanced approach.





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“As leaders, one of our essential tasks is to lead others toward a growth mindset. Leaders who teach it, live it and exemplify it are more successful in directing change.”

The 5 Key Principles of Change

Leading a firm or a business is perhaps more challenging than ever due to the rate of rapid change in technology, cultural shifts, market transitions, generational cycling and workforce expectations.

Combined with everything else going on in our world, it makes sense to want to get off of Earth's merry-go-round and take a long-term vacation from all the chaos. But getting through life's tall challenges is doable. We have proven a resilient species. And as leaders in the legal industry, we have thrived through difficult changes before. So take heart: Change is here, and it can be a win-win.

I organize my thoughts about change around five key ideas that I call “change principles.”

Principle 1: Change Is Constant

The first principle is that change is constantly occurring. It is inevitable.

Principle 2: Change Occurs by Entropy or Through Directed Effort

The second is that there are two ways it occurs — by entropy or through directed effort.

The extent of directed change an organization has is the extent of its innovation. Innovation occurs when we make changes to alter momentum. The goal of directed change is to realize a positive outcome. Selecting what to change should be guided by strategic intent to seize opportunities for improved outcomes while avoiding undesirable results.

Principle 3: Resistance to Change Is Resistance to Progress

Sometimes, we fall into the trap of thinking that nothing changes even though change is occurring all around us. Our traditions or the way we have always done things can either become a mantle of identity or an albatross to the organization.

In some matters, we have codified a process, habit or way of thinking that insulates, resists or prevents certain effects of change. Sometimes we do this to protect real or perceived advantages, what is familiar or what has produced favorable results. It is important to regularly analyze whether these ingrained structures remain optimal for our goals and our company culture. Otherwise, these old habits inhibit essential progress and unintentionally move the organization from protecting advantages to actively resisting what is better or necessary. For example, when we fail to implement technology to pursue more efficiency, we are no longer protecting favorable results. Instead, we are actively resisting efficiency.

Principle 4: Change Is About People

Change is a people-focused activity. All change is threatening.

Change resulting from entropy is subtle and merely requires inattention or inaction. It is easy to let the grass grow too tall or to keep doing what was always done before. Progressive change is much more difficult. It disrupts the familiar and comfortable.

To produce desired results while minimizing unintended consequences, change requires direct costs such as energy, thought, preparation, research, communication, decisions, investment and planning. Whether to direct a particular change should be determined by whether the benefits outweigh these direct costs and the associated opportunity costs.

Principle 5: Mindset Makes or Breaks It

The fifth principle of change is that our overall mindset determines whether it succeeds or fails. Change is often difficult because it causes us to have to reframe how we relate with the new while having a mindset postured for the old. In other words, there is a hope with the new that competes with nostalgia for the comfort of the old.

Generally, we have either a fixed mindset or a growth mindset. Those with a fixed mindset find learning new routines or new skills uncomfortable and disruptive, if not impossible. Those with a growth mindset are energized by those activities. As leaders, one of our essential tasks is to lead others toward a growth mindset. Leaders who teach it, live it and exemplify it are more successful in directing change. Providing microlearning opportunities and recognition for growth can help increase self-efficacy — the powerful self-belief that success is possible. When people believe they can grow and that growth is both necessary and produces positive results, they will devote energy to growing and be more open to directed change.

WHAT IS IN IT FOR THEM?

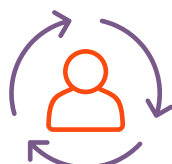
Change is hard psychologically. For us to realize the benefits of change, we have to conquer negative emotions and thoughts associated with risk, such as fear of actual or perceived loss, cognitive distortions and bias, and feelings of being overwhelmed with yet another disruption in our lives. For people to buy into change, they must see an advantage for them even more so than the advantage for the organization.

Accordingly, leaders must invest time in considering how change affects people. Leaders who lack empathy or fail to employ emotional intelligence skills throughout directed change efforts will encounter more resistance from people who do not feel supported and are more likely to see their change efforts fail.

Our charge is to navigate and lead change in ways that support our mission, our people and our future. Using the principles of change can make the difference between success and failure. Perhaps they can even help your ride of Earth's merry-go-round be a little smoother.



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REID THOMAS
Chief Strategy Officer
Ampersand

“Simply put, when holding client money in a trust, a lawyer takes on personal fiduciary responsibility. This responsibility cannot be delegated to a third party like an accounting firm, bank or software vendor.”

Top Considerations for Legal Professionals When Managing Client Funds

Every law firm, regardless of size, will find themselves managing client funds at some point, whether it's for advance payments, settlement checks or other expenses. Managing such funds is a critical piece of practice management, and improper management or use of client funds is a top reason why lawyers get disbarred.

Client fund administration requirements may sound simple, but for a busy firm or complex cases, it's anything but. Compliant administration requires good organization, discipline and experience.

Here are some basics to consider:

- » All client funds must be held separate from the law firm's operating funds and can never be commingled.
- » Client funds can be held in either a Client Trust Account (CTA), which are typically used for larger sums of money, or the Interest on Lawyer's Trust Accounts (IOLTA) program, which are typically used for smaller amounts or short-term deposits where any potential interest earned is minimal.
- » A CTA for one or more clients can be established at a bank of the law firm's choice — but must be held in an interest-bearing account labeled as a trust account for the benefit of the law firm's clients, or something similar.
- » IOLTA accounts can only be kept at banks approved by the state Bar. Any interest earned on the deposits is not for the client or the law firm, but for the benefit of nonprofit legal organizations throughout the state. The financial institution where the law firm established the IOLTA account will send any interest or dividends to the state Bar.

Simply put, when holding client money in a trust, a lawyer takes on personal fiduciary responsibility. This responsibility cannot be delegated to a third party like an accounting firm, bank or software vendor. Two significant fiduciary considerations for lawyers to pay particular attention to are accounting responsibility and selecting the bank itself.

From an accounting side, the complexity arises when there is more than one client in a client trust account, which is almost always the case, seeing as most lawyers work with several clients at the same time. Even though the money is all in one account, each client's funds must remain separate from one another.

To accomplish this, it's critical that the attorney do proper "subaccounting." Essentially, this amounts to a ledger system whereby each individual client's funds are tracked separately. When done properly, the sum of each individual client ledger will equal the total amount of funds in the account. Every ledger must properly log all transactions, such as credits, debits, interest earnings and bank fees — and must be supported by a clearly documented audit trail.

Transaction times and processes are also a consideration in accounting for these funds. For example, in a settlement case, incoming monies for a client can take up to several weeks to clear at the bank before they become "available." If a lawyer were to make a settlement payment before the funds were "available," they would in effect be using a different client's funds — thereby engaging in improper use of funds.

In addition to accounting concerns, a newer administrative challenge has emerged for lawyers. In the wake of recent bank failures, lawyers should be particularly careful when

selecting the financial institutions they use to hold client trust accounts. A typical lawyer or firm is not going to have the expertise, nor the time, to properly evaluate a bank's safety and soundness. Yet as fiduciaries for their clients' funds, they may be liable should the bank they've chosen fail.

To prevent this, lawyers should only consider Federal Deposit Insurance Corporation (FDIC) insured banks and be very careful about the account titling and subaccounting record keeping. Through what is known as FDIC pass-through coverage, when you are managing funds for the benefit of your clients and your accounts are titled correctly, deposit insurance worth \$250,000 will extend to the client. However, the coverage for any individual client, at any individual bank, is limited to \$250,000; if an individual client's balances exceed that amount, the lawyer should consider opening accounts at multiple banks to ensure that all their client funds are protected.

Managing this takes ledger complexity to a new level. Fortunately, there are service providers that offer solutions specifically designed for law firms, including those that automate the management of a network of banks to optimize deposit allocations and provide full FDIC insurance. Additionally, this process maximizes any interest for the client. As a result, these types of solutions are gaining popularity among law firms looking to de-risk the administration of client deposits.

ABOUT THE AUTHOR

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Member, ALA's Committee on DEIA

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Planning for DEIA Success: Creating a Vision Board for Your Firm's DEIA Goals

As legal administrators, we're no strangers to planning ahead and setting goals. Amid all our responsibilities, one topic that should be top of mind is diversity, equity, inclusion and accessibility (DEIA).

Now is the perfect time to take a look at your firm's current DEIA strategies and develop a plan for the rest of 2024 to ensure that the progress you've made isn't lost and that anything that needs a review or overhaul is mapped out and worked into a new strategy for optimal success.

One of the most crucial tasks you can do is review the prior year's diversity plan. What may have worked in meeting your firm's goals? What didn't work? And why? Setting aside time to thoroughly review the past year's actions means setting your firm up for success in the current year.

This is also a time to celebrate all that has worked well for your company. If your shareholders, partners, associates and administrative staff see that there is change occurring and that the company has benefited from those changes, then you will have more people aligned and committed to seeing the DEIA plan through.

Send a simple one-page visual with an explanatory email, labeling it something catchy like "Celebrating Our Strides in Diversity." Providing this very important framework helps employees review identified goals, visualize how committed the company was to these goals and celebrate the resulting achievements.

Further, conducting an analytic review of which strategies worked and which came up short is highly important. This process can essentially be as detailed or informal as

“One way to plan out your firm's future is by creating a vision board — a roadmap that goes beyond addressing challenges to embracing diversity as a strength, equity as a fundamental principle and inclusion as a shared responsibility.”

your firm would like. One question to ask yourself is, how many people are showing up to your diversity initiatives? Are they of different backgrounds, cultures, genders or minority groups?

It's also essential that you look at any hiring challenges your firm has faced. For example, if a DEIA goal was to hire more diverse entry-level associates and this goal wasn't achieved, you may need to look at your hiring process or candidate pipeline. If there was a DEIA strategy that was focused on mentorship and advancing minorities within the company, then take a deep look at whether and how those initiatives benefited the mentee and the mentors.

After reflecting on the successes and challenges you've faced in your DEIA program, you can move towards setting a vision for 2024 and beyond. Here's how.

CHARTING A NEW COURSE

One way to plan out your firm's future is by creating a vision board — a roadmap that goes beyond addressing challenges to embracing diversity as a strength, equity as a fundamental principle and inclusion as a shared responsibility. Here are some DEIA aspects you may want to include on your vision board.

1. Mission Statement and Core Values

Establish a robust mission statement and set of core values that encapsulate your firm's commitment to DEIA. This foundational step sets the tone for all your initiatives and provides a guiding light for both internal and external stakeholders.

2. Highlight ERG Goals, Events and Initiatives

Employee resource groups (ERGs) play a pivotal role in fostering a sense of belonging and unity within the organization. Outline specific goals, events and initiatives planned by ERGs to ensure a targeted approach toward diversity and inclusion.

3. Education Initiative

Knowledge is a powerful tool for change. Develop an education initiative that includes training programs, workshops, and resources to enhance awareness and understanding of DEIA issues among employees at all levels.

4. Community Involvement

Strengthen your firm's ties with the community by actively participating in local initiatives and causes. Community involvement not only contributes to social responsibility but also enhances the firm's reputation as a responsible corporate citizen.



5. Employee Engagement

Engaged employees are more likely to contribute positively to DEIA efforts. Implement strategies to boost employee engagement, such as mentorship programs, feedback mechanisms and recognition for contributions to diversity and inclusion.

6. Celebration of Differences

Celebrate diversity through events, campaigns and activities that highlight the unique qualities and backgrounds of your workforce. Creating an inclusive culture involves recognizing and appreciating the differences that make each individual valuable.

7. Metrics and Goals

Establish clear metrics and goals, ensuring that they are measurable, achievable and aligned with the overall mission of your DEIA initiatives. Regularly track progress and adapt strategies as needed.

8. Training and Development

Invest in the training and development of employees, focusing on building inclusive leadership skills and creating a workplace culture that promotes diversity at all levels.

9. Technology and Innovation

Explore innovative technologies, such as AI tools, that can support DEIA initiatives. From inclusive hiring platforms to communication tools that facilitate open dialogue, leverage technology to enhance the effectiveness of your strategies.

10. Inclusive Policies or Practices

Craft and communicate inclusive policies that set the standard for fair treatment and equal opportunities within the organization. Ensure that these policies are embedded in every aspect of the firm's operations.

11. Supplier Diversity

Extend your commitment to diversity beyond the workplace by promoting supplier diversity. Partner with diverse suppliers and contribute to the economic empowerment of underrepresented communities.

12. How to Get Involved

Empower employees to actively participate in DEIA initiatives. Provide clear guidance on how individuals can get involved, whether through ERGs, volunteer opportunities or leadership roles.

13. Feedback Mechanisms

Establish transparent feedback mechanisms that encourage employees to voice their concerns, share experiences and contribute to the ongoing improvement of DEIA initiatives.

In crafting your vision board, remember that diversity, equity and inclusion are not just checkboxes to tick off but integral elements that drive the success and sustainability of your firm. Embrace the vision, champion the cause, and together let's create a future where DEIA is not just a goal but a lived reality.

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 your lawyers’ job to become
 unforgettable.”

The 3 Fs of Client Development for Law Firms

While it was important for lawyers to get straight As in school, it’s even more important for them to get “Fs” when it comes to client development.

The Fs I’m talking about here are three pillars for growing an exceptional practice: fame, friendships and follow up. In this article, we’ll highlight each and provide approaches for excelling in each area.

1. FAME

Sir Richard Branson said: “No matter how great your product or service is, no one will hear about it if you don’t attract attention. It’s that simple.”

What this means for lawyers is they must get known by people who possess the power to give or refer work to them. They must carve out niches and get on rooftops to let their world know about them and their practices so they can be viewed as a preeminent authority. Now, we know many lawyers who feel uncomfortable with self-promotion, so it must be done in ways that can work for them.

How can you help get them there? Perhaps an estate planning lawyer is looking to grow their practice. This lawyer can find trade groups of referral sources and begin writing and speaking as frequently as possible and take leadership positions to become better known by the members of those groups. They can post on LinkedIn and comment on what other people write. They can offer articles to local publications geared to higher income readers. Perhaps they can create short video tips and put them on YouTube. Or perhaps they can partner with other complementary service providers and offer webinars. Whatever the approach, the key is to make some noise to attract the attention of those they want as clients or referral sources.

2. FRIENDSHIPS

People like working with those they know, like and trust — which means your lawyers must invest the time to build one-on-one relationships with high-value people. The process here is to identify people who can have an impact on your lawyers' careers, and methodically develop approaches where connections are built.

Let's take a corporate lawyer who is building an emerging company practice. She can offer to conduct office hours at local business incubators, where she will meet founders. Additionally, she can interview venture capitalists for articles and conduct training programs for their portfolio companies. She can meet with accountants and offer training sessions for their clients or conduct webinars with the accountants at local trade groups. All the while, she can give referrals to people in her network — which often triggers reciprocity.

As described in the fame section above, she can take a leadership position in a group filled with potential client or referral sources, and then use that position to connect with important individuals to discuss topics related to the group. Also, she can invest in some social time. For example, I recall hearing about a lawyer who had nine meals a week with high-value people in his network! While that is a bit extreme, the lesson is people always eat, and that time can be used to develop and deepen relationships.

3. FOLLOW UP

It's not the job of people to remember your lawyers; it's your lawyers' job to become unforgettable. That means they must actively stay in the minds of high-value people. Time and again, I've seen lawyers get work that otherwise might have gone to other lawyers based on their relentless — but welcomed — follow up.

How to do it in a way that feels elegant and valued is the secret sauce here. Based on the situation, there are different approaches that can be used. For most contacts, they could be included in ongoing communications of newsletters, alerts or tips. Your lawyers can reach out to former clients to simply check on how they're doing. Perhaps a certain type of potential client is a good candidate for being a co-presenter on a panel discussion. Perhaps another would welcome the offer of training for their leadership team. Another might like to join a group, while others might welcome introductions to people who could be of value to them.



The most important thing is your lawyers should never let anyone of value slip through the cracks. Have them create spreadsheets, track when they make connections and watch for gaps of time so no relationships go stale. There are millions of dollars of work that go to other firms that could come to your lawyers if they had solid follow-up systems keeping them top-of-mind.

In all, growing a great book of business is much more than being a technically good lawyer.

It's about strategically building fame, fostering the right friendships and following up relentlessly. By making your lawyers proud to earn the three "Fs," it will result in one more F — financial results!

ABOUT THE AUTHOR

David H. Freeman, JD, is a member of the *National Law Journal* Hall of Fame for being voted the top law firm business development coach and consultant in the United States for several consecutive years. For 30 years he has worked with over 10,000 lawyers in hundreds of firms worldwide, and he has created an online training and group accountability program, Lawyer BookBuilder®, that guides lawyers on how to become rainmakers. He has also developed a Return on Potential Calculator, which is a free tool that shows firm leaders, group leaders, and individual lawyers how much revenue they could generate if they (or their groups) became better rainmakers.

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PHILLIP M. PERRY

Freelance Business Writer

“You have to understand that the people that you are leading can contribute more. Too often, though, poor leaders don’t listen to staff. As a result, people withhold their ideas. And the opportunity is lost to make the culture more productive.”

Building a Healthy Firm Culture

Open communication can lead the way to a more engaged staff.

One in every three leaders create an environment of fear in the workplace, according to a global study from New York City-based First & First Consulting. The resulting toxicity is costing employers real money in terms of diminished productivity. People who mistrust their leaders, after all, will keep their heads down, do the bare minimum required of their positions, and avoid taking any risks that might jeopardize their jobs.

An underperforming staff is especially costly in the legal industry with its heavy human capital investment. “Law firms have huge personnel costs,” says Phil Geldart, Founder and Chief Executive Officer (CEO) of Eagle’s Flight, a company focused on improving individual and team productivity. “But they are not getting the best return value, because they are not tapping into the full potential of their workforce.”

Workplaces with healthy cultures, on the other hand, create positive vibes that encourage initiative and productive risk taking. Moreover, they tend to keep their “A players” and attract new ones — characteristics that can help bolster the bottom line.

“A healthy workplace culture can improve a law firm’s retention of both staff and attorneys,” says Cynthia Thomas, Regional Administrative Manager at Offit Kurman, Los Angeles, and a member of ALA’s Professional Development Advisory Committee. “The more people are engaged, motivated and happy, the more likely they are to stay. We all know the high costs of turnover. And a law firm located in a tight market area can go months before finding a suitable replacement when someone leaves.”

Plus, a healthy culture can be of major help when it comes to hiring. “Top talent wants to join a firm that has a good reputation,” says Thomas. “That’s especially important to many younger professionals who want a sense of identity attached to their employment. They expect their law firm to be the place they want to get up and go to in the morning.”

"Some leaders think they need to have all the answers because they have been put in charge. But good leaders concentrate more on getting results. And the way to get results is to get input from the people who actually have to do the work."

ENCOURAGE ENGAGEMENT

But how can a law firm create a healthy workplace culture? The first step is to recognize the potential for improvement. "Almost without exception, every individual comes to work wanting to give the very best and most they can," says Geldart. "The average person really wants to do their best to excel. And furthermore, they have amazing potential."

It's up to the firm leadership to bring out that potential. The body, after all, follows the head. "A healthy culture needs to be a top-down initiative," says Thomas. "Management has to lead the charge. Top shareholders, managing principals and every other member of senior management needs to be involved."

And to get back to the survey results that opened this article: Fear must be eliminated as a motivating force. "Too often new leaders feel that their new title and authority gives them the right to dominate," says Geldart. "But what it really gives them is the responsibility to deliver."

OPEN COMMUNICATION

Rather than motivate through fear, effective leaders encourage their staff to participate in the operations of the firm to the best of their abilities. The key word here is engagement, and the pathway to success is open communication: The tearing down of the walls that too often inhibit the very sharing of important information that can diminish the incidence of organizational dysfunction.

"Too often, the legal profession has promoted an us-versus-them dynamic," says Thomas. "The division between attorneys and non-attorneys is something that doesn't exist in other fields. There are no non-accountants, non-CPAs, or non-doctors, for example. It would really help if the legal field would move away from that dichotomy. And having open communication across the organization can go a long way toward bringing that about."

Personal, face-to-face contact is an essential part of open communication. "Too often the temptation is to rely on emails and Teams messaging, so that there's no personality coming through," says Thomas. "It's really important for the firm to create an open-door environment that encourages people to chat with others on a personal level. Personalizing the interactions makes people want to do things for you."

CHANGING GEARS

Geldart notes that great leaders create personal connections with people, then utilize the resulting dynamic as a springboard for enhanced communication throughout the firm's activities. "By getting input from the people to whom you're about to assign work, you immediately get their engagement, their heart and their practical insight."

Not only does enhanced communication lead to better decision-making, but it encourages a sense of engagement by the staff that is part and parcel of a healthy workplace culture. Before assigning a project to an individual or a team, for example, the effective leader will ask questions such as: What do you think? What's possible here? What can we do? What can get in the way of success? What are some of the hurdles you see to our success?

This kind of bottoms-up feedback and project engagement can require a management mind-shift. "Some leaders think they need to have all the answers because they have been put in charge," says Geldart. "But good leaders concentrate more on getting results. And the way to get results is to get input from the people who actually have to do the work. If you get enough input, you know everything you need to know before you make decisions. People do a better job, and you get better outcomes."

REQUESTING FEEDBACK

Every law firm has a unique set of dynamics. Initiatives that create a healthy workplace at one law firm may not be right for another. How can your own organization select the right internal programs? Thomas suggests going to the source: Ask the people for suggestions on improvements. "We created an anonymous survey with questions such as 'What is it about the firm you like?' and 'What can be improved?'" says Thomas. "We got a lot of useful feedback."

One requested change was for flexible start times. "We now have a window that allows people to arrive at work between 7:30 and 9 a.m. This can be an especially valuable policy in some areas because of crowded roads or the way the transit system works."

"A healthy culture needs to be a top-down initiative. Management has to lead the charge. Top shareholders, managing principals and every other member of senior management needs to be involved."

Other initiatives sparked by the survey were new ideas for staff appreciation days and team-building activities that involved the local community. "We are located in the downtown area, so we have a large homeless population," says Thomas. "We got involved by participating with a local organization's holiday coat drive."

It's important to take action on the survey results in a timely manner, notes Thomas. Her law firm conducted its survey in the summer of 2023 and within a couple of months had already held an in-office staff event. Flexible start times were introduced shortly thereafter.

With the right bottom-up input, law firm leadership can start transforming its workplace culture in a way that encourages staff engagement and productivity. All it takes is a determined mindset.

"You have to understand that the people that you are leading can contribute more," says Geldart. "Too often, though, poor leaders don't listen to staff. As a result, people withhold their ideas. And the opportunity is lost to make the culture more productive."



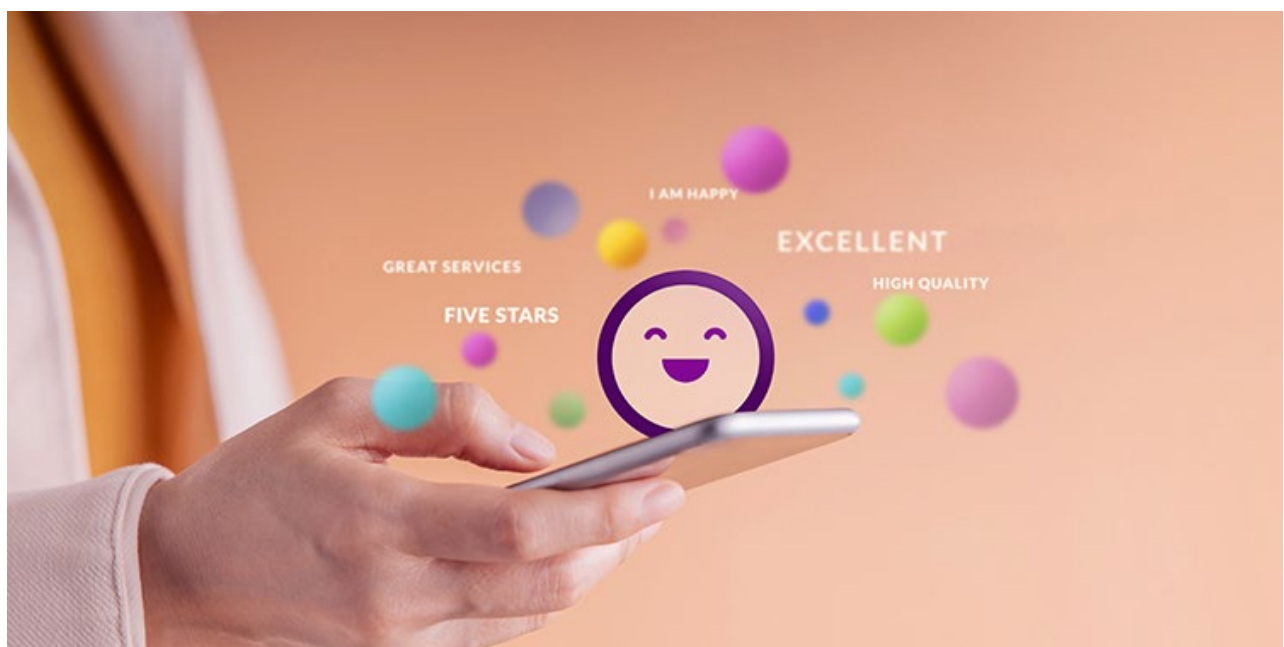
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ABOUT THE AUTHOR

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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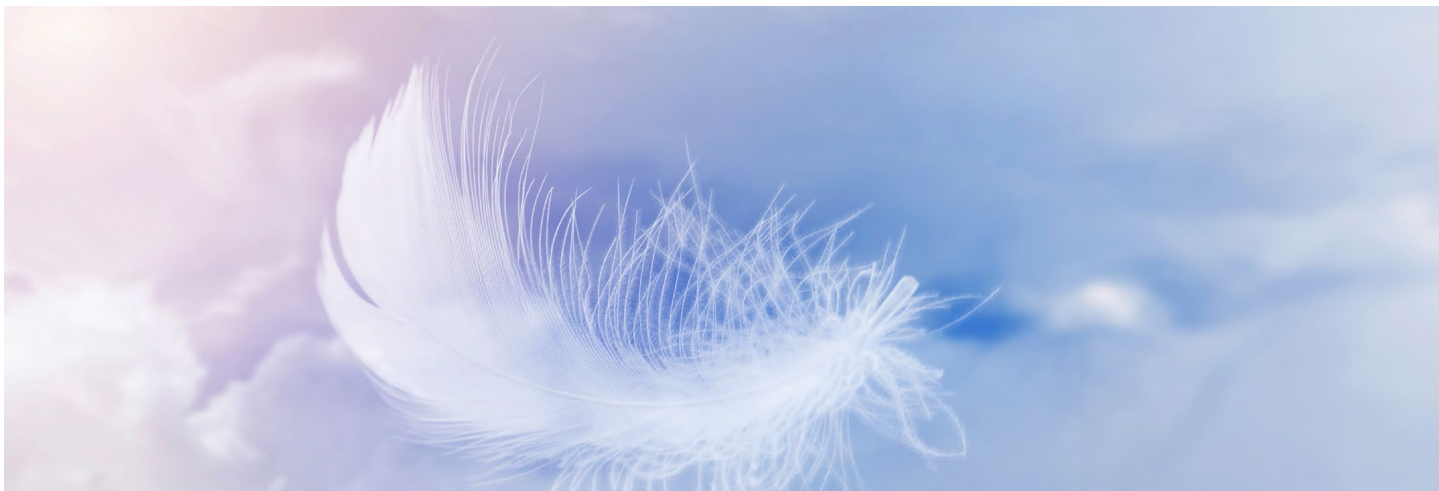
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“When young people just don’t see room for growth, they’re going to go somewhere else where they can see themselves climbing the ranks.”

Building Natural Rainmakers, One Lawyer at a Time

Navigating firm members’ feelings about retirement can require a nuanced approach.

It likely won’t surprise you to learn that law firm leadership largely isn’t looking to exit the workforce at age 65. Statistics indicate a number aren’t leaving at the traditional retirement age. From 2006 to 2022, departing law firm leaders were, on average, 64 years old; since then, the age has shifted to 66, according to a Law.com analysis.

Some leadership members appear to be staying on board even longer. Separate research from legal intelligence provider Leopard Solutions indicates 40% of managing partners at the top 200 revenue-producing law firms are approximately 61 to 70 years old — and 8% are between 71 to 79.

Firm leaders’ retirement plans can vary for a number of reasons. Partners may, for instance, worry clients will leave if they do — or struggle with retiring because their identity is strongly tied to their career, says Kathryn Scourby, Principal at KNS Consulting, which provides business continuity services to professional firms.

“They’ve worked really hard over the course of their career; they have a lot of professional accomplishments,” Scourby, a member of the Richmond Chapter, says. “It’s that fear of, ‘Well, I really was an important person as part of this firm, and if I leave, do I then become a previously important person?’”

Law firms, however, can face numerous issues if key members leave earlier or later than expected — ranging from institutional knowledge loss to client relationship and hiring and retention challenges, according to Leopard Solutions Chief Executive Officer (CEO) Laura Leopard.

"Continue the conversation about succession planning at our 2024 Annual Conference & Expo as John Mitchell, Managing Director, KM Advisors LLC, outlines how to analyze your firm's succession strengths and weaknesses and create a plan that you can easily implement, evaluate, and adjust. Register at alaannualconf.org."

"When young people just don't see room for growth, they're going to go somewhere else where they can see themselves climbing the ranks," she says. "People coming in, going right back out the door, that's a very costly thing for firms — [and] partners leaving in midcareer sends a bad signal to the world."

Bowing out of the workforce can be an emotional endeavor for professionals who have been in the legal industry for decades, and the aftermath can significantly impact a firm's operations.

To ensure all involved parties share the same view of how — and when — the process will transpire, law firms may want to consider establishing retirement succession planning-related policies and procedures.

MANAGING PERSONNEL MOVEMENT

To build some certainty into succession planning timeframes, some firms set mandatory retirement age or other limits.

Chicago-based Levenfeld Pearlstein's founders didn't want all the firm's decision-making to be limited to one generation or age range. With that in mind, they decided executive committee members and managing partners wouldn't be over 60 years old.

"If there's no progression plan, all the power [can] rest with people who are only thinking two or three years out," Chief Executive Officer Jeremy Gresham says. "They're going to make decisions to maximize today's income at the expense of the future firm. You want your leadership always thinking, what's going to happen five years from now? How are we best situated to meet the future?"

While the firm's former CEO wasn't subject to any term limits, she decided to step down after an extended period in the role — and essentially gave the firm five years' notice.

That allowed Gresham, who officially took over the role in 2022, to work with a communications coach to enhance his public speaking and writing skills — which, as a Chief Financial Officer, he says were likely more numbers-oriented. Levenfeld Pearlstein also added a chief learning and development position. The firm's overall succession planning

strategy involves working to continuously identify leadership candidates, Gresham says, and provide chances for them to ascend to management roles.

"[With] intentional succession planning, there's fewer surprises," he says. "You can analyze your possibilities, what someone might need. You should always be looking at how to get your future leaders ready to be the leaders you want them to be. It's one thing to identify high-potential [employees] — but if you're not doing anything to develop them, you're missing an opportunity."

An external consultant may be able to offer a fresh perspective on talent evaluation, according to John Mitchell, Managing Director at KM Advisors, a consultancy specializing in professional service provider-based leadership development.

Establishing an internal succession-focused committee that's able to supply an array of viewpoints may also help a firm effectively identify and begin preparing candidates for subsequent positions.

"Some firms have very sophisticated leadership development programs," Mitchell says. "They don't know who is going to be their managing partner 10 years down the road, but they know if they don't develop multiple people, they won't have the right person ready at that time."



Leadership decisions at K&L Gates LLP are made by members of a management committee who serve staggered terms, which prevents a significant number of new appointees from stepping into their role at the same time.

Firm members with diverse tenure, practice area and other professional experience are chosen to serve on the committee, according to the firm's Chairman Michael Caccese, who also leads its Asset Management and Investment Funds practice.

"[As] a global law firm, that's really important," Caccese says. "We have 48 offices — so we really have to have a very good view of what's happening around the world in the different markets we operate in, and in different practice groups."

Previously, one person served as the firm's chairman and global managing partner. Due to K&L Gates' growth over the years, when he stepped down in 2017, the firm split the function into two roles. Their terms are also staggered to ensure, during transitions, one person will be well-situated in their role.

To enable younger firm members to possibly assume a leadership role someday, Caccese says he and the current global managing partner try to give candidates ample exposure to decision-making within the firm.

"We make sure we get people involved in different efforts, whether it's task forces, training programs — and we share a tremendous amount of information," he says. "We work closely with different groups so hopefully, when the decision is made that somebody's term will not continue, we can have a stable of people that will be skilled and available to take over those roles."

FURTHER PROFESSIONAL ADVANCEMENT PREPARATIONS

Term and other directives can help demystify employees' career path plans within a firm; yet they aren't always celebrated policies.

"Anger, we see a lot," Mitchell says. "[And] tons of pouting and denial as firms that have retirement procedures and mandatory retirement ages try to enforce them."

If law firms don't want to institute that type of system, they could instead proactively ask partners to draft a hypothetical plan for their departure long before it occurs — including a list of who might be able to take over their current clients — which Scourby says can help clarify salary expectations and when certain roles will need to be filled.

"If there's no progression plan, all the power [can] rest with people who are only thinking two or three years out. They're going to make decisions to maximize today's income at the expense of the future firm. You want your leadership always thinking, what's going to happen five years from now? How are we best situated to meet the future?"

"By the time a shareholder reaches 65, it's way too late to introduce thinking about succession planning and whether they want to ease out of the firm," she says. "If you start that conversation with every lawyer in the firm at a particular time — such as when a lawyer turns 50 — these plans can be reviewed every couple of years. They don't have to be set in stone, but at least you've got something in writing."

Attorneys at Steptoe LLP fill out a series of career-related questions when they reach a certain age, which are embedded in the online performance planning form the firm distributes annually.

Partners review their plan with the firm's CEO and department heads, according to Director of Professional and Staff Development Jennifer Trippett, who is an Independent member and a member of ALA's Professional Development Advisory Committee.

"It's driven by a policy, but it also is something that is so deeply personal that it's not as simple as just saying to someone, 'Oh, you're thinking of retiring; here are the steps you take,'" Trippett says. "It's a constantly moving target, and it touches on so many areas. There are financial and business implications to the firm; talent development implications — also how certain departures are going to impact culture in an office or specific team."

Firms may benefit, Trippett says, from examining how previous partners leaving played out.

"It's about having a strategy and proven pathways," she says. "You need to take account of what's worked and what hasn't in some of these transitions, study that, [then] debrief on it so you can guide decision-making going forward — saying, 'We had a similar situation with someone else who worked in a like practice area,' or 'They had a client who had similar needs; this is what worked in that situation' — and then model around that."

If, despite the schedule that's been discussed, a firm member isn't quite ready to leave the workforce as the time approaches, Scourby suggests presenting alternative ideas.

Partners who are reluctant to retire could, for example, plan to mentor younger lawyers in a certain practice group who would benefit from client development and relationship guidance.

Experienced attorneys might otherwise enjoy contributing to the community by sitting on a corporate or nonprofit organization's board.

"In my former firm, some of the partners that were heading toward retirement decided they didn't want to take on new clients, but they wanted to maintain their law license and still practice law to some degree," Scourby says. "The firm discussed options they might want to consider. A good option, from a practice perspective, was to handle pro bono work in the firm."

Facilitating a meeting with a financial planner as retirement nears, Mitchell says, might also prompt firm members to solidify their plans.

"They often will find out their views of what it would take to retire and live a lifestyle they want to live [they] could have done five years ago," he says. "The planner will tell them, 'You've already made enough money.' That's another way you can try to help manage some of the psychological fears — giving, or at least encouraging them to get resources that will help them understand the financial opportunities."

With the risks management continuity issues can pose, firms may understandably be concerned about the way leadership members' exits will ultimately unfold.

Succession planning, however, doesn't have to only involve attorneys. Pinpointing other employees' retirement plans can help law firms avoid other similarly debilitating unexpected departures — and potentially uncover valuable additional resources.

"We often see partners retire who have been supported by the same person for sometimes decades," Trippett says. "Maybe that person is following a similar timeframe, or maybe they're not. You can actively leverage staff in this situation to be an integral part of the process and keep things moving and organized."



Learn More About Succession Planning with *Legal Management Talk*

No attorney wants to think about what happens when they stop practicing, but it's crucial to have those conversations now. Debbie Foster, Partner at Affinity Consulting, recently joined ALA's podcast to discuss how to bring up those difficult conversations and why it's important to not only your firm, but your clients, to have a solid plan in place in case a lawyer retires or has to stop working. Tune in today at alanet.org/podcasts.

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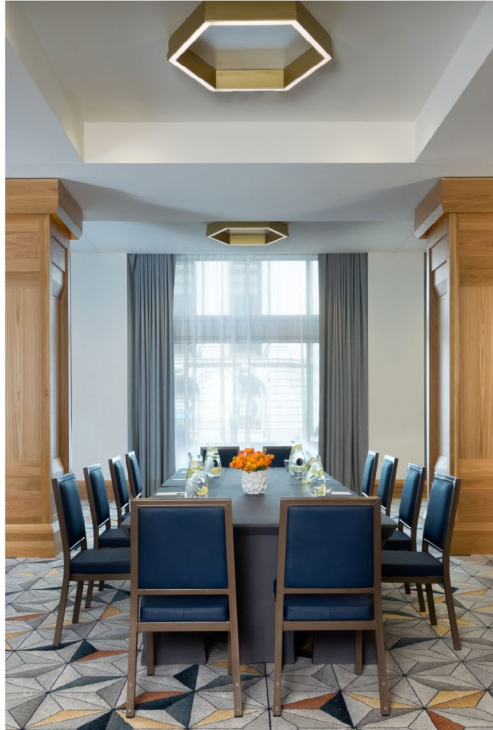
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Freelance Writer

“Social media makes everyone look like an expert, and we compare ourselves to these kinds of popular archetypes.”

Battling Imposter Syndrome

Feelings of inadequacy aren't uncommon in legal professions. We explore where they come from — and how to combat them.

You've done everything right in your career. You received a good education, secured the credentials you needed and snagged a prestigious position at a law firm. Still, no matter how hard you work and how accomplished you are, there is always a voice in the back of your head telling you, "You are not enough. You don't deserve to be here. Who do you think you are?"

If you relate to this, you could very well be experiencing imposter syndrome.

"Imposter syndrome feels like constantly looking over your shoulder thinking that at any moment, someone is going to walk in and take your spot because you've been figured out, and you actually do not belong in the position that you're in," says Chassidy Deckard, Director of Administration at Pillsbury Winthrop Shaw Pittman and a member of the Houston Chapter. "You find yourself continuing to try to prove you are worthy by acquiring more degrees and certifications, sitting on boards, attending professional development activities and still at times feel that you are not enough."

So where do these feelings of inadequacy come from? In modern society, imposter syndrome is pretty common. The American Psychological Association states that up to 82% of people feel it. According to Frank Thewes, LCSW, a therapist at Path Forward Therapy LLC, it arises when you are insecure, anxious and lack confidence.

"These seem to be traits that are all too common these days," he says. "Social media makes everyone look like an expert, and we compare ourselves to these kinds of popular archetypes."

Along with influences from the outside world, imposter syndrome may take hold if you have negative experiences in your past or certain personality traits. Faisal Tai, a board-certified psychiatrist and Chief Executive Officer of PsychPlus, says that it can come from perfectionism, early life experiences and internalized beliefs.

“Employees are often grouped into two categories: lawyers and ‘non-lawyers.’ Many legal administrators have imposter syndrome because they are often viewed as a non-lawyer. By being in a class of something that you are not, it can cause one to feel like they do not belong and do not have the ability to succeed in that environment.”

“It often occurs when individuals attribute their success to luck or external factors rather than acknowledging their own capabilities, leading to a persistent fear of being exposed as a fraud.”

WHY LEGAL ADMINISTRATORS EXPERIENCE IMPOSTER SYNDROME

In the highly competitive and stressful legal world, imposter syndrome often takes hold.

“It is a very fast paced and competitive environment, usually high stakes and high pressure, often led by attorneys,” says Michelle D. Cohen, Director of Human Resources and Office Manager at Schneck Law Group LLC and a member of the New Jersey Chapter. “You literally have a microcosm of competitive humans that are all doubting themselves and needing to be right all the time. Throw in humans with life experiences ... and you have a mix that will be perfect for tapping into just about everyone’s insecurities on some level.”

The way law firms are structured also makes them an environment ripe for imposter syndrome.

“Employees are often grouped into two categories: lawyers and ‘non-lawyers,’ says Deckard. “Many legal administrators have imposter syndrome because they are often viewed as a non-lawyer. By being in a class of something that you are not, it can cause one to feel like they do not belong and do not have the ability to succeed in that environment.”

Additionally, it’s been proven that women and people from diverse communities are more likely to struggle with imposter syndrome. According to Deckard, this is because many diverse professionals grow up hearing phrases like “you have to work twice as hard” or “fake it ‘til you make it.”

“When we enter a law firm with that mindset — feeling like you’re working harder than everyone, surrounded by coworkers that do not look like us — it can feel very isolating,” Deckard says. “It’s easy to begin doubting our abilities and feeling like frauds, and although we’ve ‘made it,’ we still question if we are still faking it and wonder when someone is going to figure it all out.”

COMBATING IMPOSTER SYNDROME

You may have been dealing with imposter syndrome your entire life, but that doesn’t mean you can’t fight the feeling and transform your mindset.

“We have to combat imposter syndrome because it is a lie,” says Thewes. “Imposter syndrome is a false belief about ourselves that if unchallenged can increase worry and anxiety. This can reduce our bandwidth for work, relationships and everything else we value.”

According to Cohen, imposter syndrome adds extra pressure and stress to what could already be a nerve-wracking situation.

“We could use all that amazing energy to solve all the problems in the world rather than overthink what we are already excellent at in the first place,” she says. “It is wasted energy misplaced and self-tortuous, quite frankly. It is exhausting.”

If you have a false belief that imposter syndrome keeps you on your toes and pushes you to succeed, it’s time to dispel that and go forward with a more positive outlook. You can do that by first checking out the evidence, including your resume and past accomplishments.



"Thank goodness for close pals from ALA. These are other people who do your job and have so many things in common just from a work perspective. Then add in the other issues or challenges, and you have humans with a lot of commonalities. It really was a game changer for me personally and professionally."

"This is your North Star for battling imposter syndrome," says Thewes. "You can't argue with your list of past successes. They are the path you walked into your today on. That's why you are where you are. Those don't change because your self-confidence has taken a temporary dip. You're so worried about future performance that you forget your track record of past achievement."

This is something that Cohen has done.

"When I go back and listen to my guest appearances or see a video of me presenting on a national stage to colleagues, I think, 'Wow, I sound so professional and smart!'"

Additionally, Tai recommends seeking support from your peers, setting realistic goals and recognizing that nobody is perfect. "Building self-confidence and focusing on your skills can contribute to overcoming imposter syndrome," he says.

For Deckard, doing daily positive affirmations and self-talk help combat imposter syndrome. As a legal administrator, it's important to have a to-do list and keep track of everything you worked on throughout the day.

"It's rare that our day-to-day tasks are the same on a consistent basis," she says. "I have a to-do list. On days when fires appear and change the trajectory of my workday, I notice myself feeling inadequate when leaving for the day without checking off a single thing on the to-do list. After processing those feelings, I decided to begin writing down tasks I completed each day that were not initially on my to-do list and checking those things off. Being able to find ways to turn negative feelings into something positive and feeling accomplished and fulfilled helps me be more productive."

Of course, make sure you talk to other legal administrators, who are surely dealing with similar issues and can validate your feelings.

"Thank goodness for close pals from ALA," says Cohen. "These are other people who do your job and have so many

things in common just from a work perspective. Then add in the other issues or challenges, and you have humans with a lot of commonalities. It really was a game changer for me personally and professionally."

Also don't be afraid to ask for help or be vulnerable if you need to, Cohen advises. Sharing your struggles and admitting when you could use a hand can be effective not only when it comes to fighting imposter syndrome, but also making you more effective at your job and satisfied with it.

"Be proud that you are human," Cohen says. "The more you are transparent and share appropriately with other colleagues, the sooner you level that playing field and make some allies who respect you along the way."



Continue the Conversation: Imposter Syndrome in Legal (and Life)

Imposter syndrome — we all experience it in our daily lives. Talking about it is one way to get through it. We did just that with Roberta Bauer, Regional Office Administrator of Ogletree Deakins and 2023–2024 Chair of ALA's Professional Development Advisory Committee, in a recent episode of *Legal Management Talk*: alanet.org/podcasts. Plus, find out the solid advice The Berenstain Bears offer for working through feelings of insecurity. Check out the PDAC roundtable on imposter syndrome here: alanet.org/roundtables. (Note: You must be logged in to view.)

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

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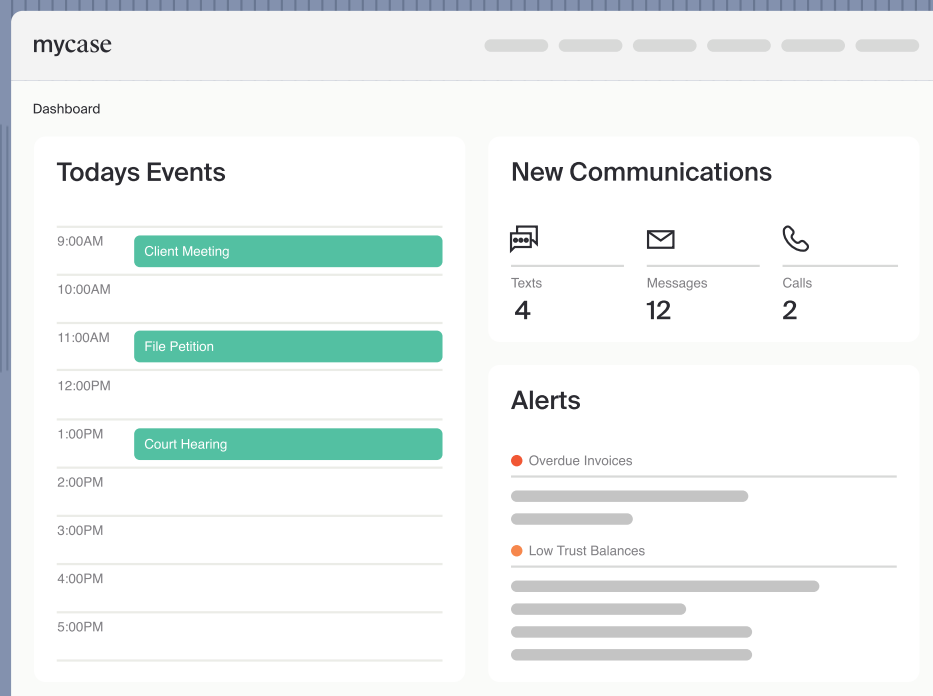
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How to Make Tax Season a Breeze for Your Law Firm

Tax season doesn't have to be a time of stress and last-minute scrambling for law firms and attorneys. With the right preparation (and tools), you can turn this often-dreaded period into a smooth, manageable process.

Whether you're flying solo or are part of a large legal practice, there are straightforward steps you can take to get your financial house in order well before you need to file taxes for the year.

Let's review some essential tips to ensure your law firm is ready to meet tax season head-on.

MAKE TAX PREPARATION A YEAR-LONG PROCESS

Tax prep is inevitable. If you chip away at the main tasks and stay organized during the year, you'll barely register the stress of this notoriously challenging season.

Prepare for tax season throughout the year with efficient record-keeping and billing practices. Keeping documents organized prevents the end-of-year or last-minute scramble to balance accounts and locate information to complete tax forms.

For example, use the advanced reporting features in your legal billing software to keep track of your accounts receivable, expenses, write-offs and other financial information each month. Additionally, check in on your general ledger processes early to stay on top of your bank account balances and reconciliation status, and correct coding errors when necessary.

What else can you do to stay on top of your tax-related tasks? Here are five more tips.

1. MANAGE IRS FORM 1099 YEAR-ROUND

Many law firms struggle with IRS Form 1099-MISC and Form 1099-NEC each year, and each form has different requirements to follow. For example, the IRS requires Form 1099-NEC when your law firm pays over \$600 in compensation for services to individuals who are nonemployees, such as court reporters, expert witnesses, co-counselors, jury consultants, etc.

Who issues Form 1099s?

Typically, the payor of a taxable settlement or judgment payment issues Form 1099-MISC to the payee. However, some law firms might be required to issue a form 1099-MISC if they play a significant role in overseeing and managing the client's settlement or trust funds.

When do law firms receive 1099s?

In addition to issuing numerous 1099s, your law firm should receive 1099s from clients who pay you \$600 or more during the year for legal services or nonlegal services. The 1099s you receive must be included with your law firm's business tax return.

When should 1099s be issued?

The deadlines range from January 31 to the end of February, depending on the type of form 1099 being issued.

You can avoid headaches with 1099s by tracking payment activity throughout the year. Law firm accounting software helps you record payments and receipts that require 1099s, prepare tax forms, mail recipient copies, and file the forms electronically with taxing authorities.

2. TRACK DEDUCTIONS AND EXPENSES

Many expenses your law firm incurs can be deducted on tax returns. Examples of typical law firm deductions include, but are not limited to:

- » Credit card transaction fees
- » Travel and mileage
- » Office expenses
- » Continuing Legal Education (CLE)
- » Advertising and marketing
- » Insurance premiums
- » Professional dues
- » Research materials
- » Retirement plan contributions for employees
- » Fees for professionals

Your tax professional should advise you about the business expenses you can deduct. However, you need to provide your tax professional with accurate and complete information about law firm expenses for them to determine which expenses can be used as law firm deductions for tax purposes.

Tracking expenses throughout the year and posting the amounts to the correct categories is essential.

3. INVEST IN LEGAL ACCOUNTING SOFTWARE

If your law firm is manually entering and preparing financial reports or using software not specifically designed for law firms, switching to a law firm accounting software may be the best way to prepare for tax season. It can streamline your law firm's accounting process and provide enhanced financial information about your law firm, which decreases the risk of costly errors and mistakes.

When choosing legal accounting software, search for a provider that integrates with your practice management software. Many systems also integrate with other products a law firm might use, such as document management platforms, secure file sharing, payroll services, and tax form preparation and filing.



4. COMPLETE YOUR YEAR-END FINANCIAL ANALYSIS

Attorneys and law firms need to perform a year-end financial analysis for many reasons, including preparing for tax time. Because you may need to take care of outstanding issues before the end of the year, you benefit from performing these year-end accounting and financial steps early in the process:

- » Identify and collect outstanding accounts receivable. Ensure all billing and time entries are current, prepare an accounts receivable report, and take steps to collect outstanding balances.
- » Review the law firm's accounts payable report to ensure all payments due before the end of the year are paid.
- » Ensure all client ledgers are up-to-date and balanced. Reconcile all trust accounts as of December 31.
- » Review your Owner's Draw account to ensure attorneys are paid all amounts owed to date. If you have unpaid receipts or travel expenses, pay those now before the end of the year.
- » Make year-end charitable donations and retirement contributions to reduce taxable income.

Finally, prepare and review the law firm's financial statements, which may include income statements, balance sheets and

cash flow statements. These statements will give you an overview of the practice to ensure everything is recorded and reconciled.

5. KNOW YOUR TAX FILING DEADLINES

Various tax filings have different deadlines. Check with your tax professional to verify tax deadlines now so you are not in the position of rushing to complete financial reporting and tax forms at the last minute. You should also know tax deadlines for filing payroll taxes, quarterly taxes and other tax obligations for the law firm.

Making tax preparation a year-round endeavor instead can make the process less daunting!

ABOUT THE AUTHOR

Bruce Policky is the Director of Enterprise Sales and Success at Software Technology LLC, the maker of Tabs3 Software. He is responsible for managing all marketing, sales and training activities. Over his 30+ years with the company, he has helped clients and consultants in the legal software industry meet their billing, accounting, practice management and electronic payment needs.

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“The firm’s managing partners and the CIO need to understand one another and have a shared vision for how the relationship should go.”

How to Find the Right Chief Information Officer for Your Law Firm

Leaders often view their information technology departments in the abstract. For too many of them, those departments are just a cost-of-doing-business function that they don’t have to think about as long as everything operates as it’s supposed to. It’s all rather impersonal.

But it shouldn’t be.

Many industries are being disrupted by IT. One such industry is tax preparation and filing. In less than three decades, the industry evolved from paper tax filings to today’s reality where over 94% of the tax preparation and filings are done via electronic software. The legal industry is poised for such disruption and every law firm will have to make a serious decision. What type of Chief Information Officer (CIO) do they want to bet on? The one who helps them to survive — or the one who can help them thrive?

Let’s take a look at factors to consider to help you land the “right” CIO for your law firm.

SHARED VISION AND TRUST

The firm’s managing partners and the CIO need to understand one another and have a shared vision for how the relationship should go. Additionally, the CIO needs to understand and support the goals that motivate those at the head of the firm. Meanwhile, those in the firm’s leadership positions need to be realistic about what IT can and cannot deliver for the law firm.

PRODUCT MINDSET

CIOs are typically responsible for two broad buckets of things. In one bucket sits the computing systems and software they are expected to maintain. The other bucket contains the capital projects to add new systems or make significant changes to existing systems they are expected to execute.

One of the key disruptions in the tax preparation industry was TurboTax. It was developed as a product and not just as a capital project. The difference may seem subtle, but the disruptive effect is very dramatic between a project versus a product mindset. For a CIO to develop a product mindset means they have to have the courage to dream of a product like the iPhone even when the customers did not even offer the specifications.

CHANGE AMBASSADOR

Any disruption requires significant change. One common trait between customers, employees and suppliers is they all are resistant to change — especially so within legal. Instituting change among a large and diverse group of people often lies with the CIO.

While CIOs are often not trained to understand behavioral psychology, it's important to find a CIO who has the ability to champion necessary changes so the firm can stay tech-savvy and competitive. It's an acquired skill but often the most important.

The ideal IT leader really does need to be a Renaissance person — someone who can understand the legal world and

the IT world well enough to connect them and make them function together smoothly. Unfortunately, as we know, ideal candidates aren't always available. The next best bet is to go with someone who is technically strong and shows promise for growing into the other aspects of the position. Then provide that person the guidance they need to bring them up to speed in terms of additional knowledge they need specific to law firms.

The perfect candidate may not exist, but with the right filters, you can bring in someone who will deliver for your law firm while maintaining a pleasant and effective working relationship with you and other people throughout the organization.

ABOUT THE AUTHOR

Saurajit Kanungo is President of the consulting firm CG Infinity and is passionate about leveraging the vast business potential of IT. Starting as a chartered accountant in India, Kanungo upgraded business systems at that country's major airports, then moved to the United States and focused on helping midsize companies to flourish. Kanungo has served hundreds of clients across many industries and has program-managed large-scale multiyear, multimillion dollar digital transformation initiatives.

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RYAN SPEAR
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“Firmwide retreats stand as a beacon of hope in the legal profession, offering a holistic approach to mental health and well-being. By prioritizing team-building, stress reduction and open dialogue on mental health, these retreats have the power to transform the workplace culture within law firms.”

The Case for Embracing Firmwide Retreats to Boost Mental Health

The legal profession is notorious for its demanding nature, high-stakes cases and relentless deadlines. The pressure and stress associated with legal practice can take a toll on the mental health of all staff. Recognizing the need for a holistic approach to well-being, many law firms are turning to firmwide retreats to prioritize mental health and rejuvenate their teams.

Legal professionals often find themselves working in high-stress environments, navigating complex cases and managing client expectations. The relentless pace of the legal world can lead to burnout, anxiety and other mental health challenges. Long working hours, tight deadlines and the pressure to succeed can contribute to a culture where mental well-being takes a back seat. Research in the legal sector has found that employees who feel unsupported by their firm or direct work supervisor are more likely to experience burnout. A survey from Unmind states that nearly one in five employees (17%) say they often do not have energy to pursue what is important to them by the end of a working week.

Legal administrators and attorneys may grapple with mental health issues such as anxiety, depression and stress-related disorders. The nature of the work — coupled with the adversarial character of the legal system — can create an environment where seeking help is perceived as a sign of weakness. This stigma surrounding mental health issues can exacerbate the problem and hinder individuals from finding the support they need.

THE BENEFITS OF FIRMWIDE RETREATS

Recognizing the need to address mental health concerns in the legal profession, some forward-thinking law firms are turning to firmwide retreats as a proactive measure. These retreats are designed not only to provide a break from the daily grind but also to foster a supportive and collaborative culture within the firm.

Here are some key benefits of organizing firmwide retreats for legal professionals.

1. Team Building and Collaboration

Firmwide retreats provide a unique opportunity for legal professionals to interact outside the confines of the office. Team-building activities, workshops and collaborative sessions can promote stronger relationships among colleagues. Improved communication and a sense of camaraderie contribute to a healthier work environment.

2. Stress Reduction

Removing legal professionals from their daily work environment can significantly reduce stress levels. Retreats offer a break from the intense demands of legal work, allowing participants to recharge and gain perspective. Engaging in activities that promote relaxation and mindfulness can be particularly effective in alleviating stress.

3. Skill Development and Learning

Retreats can incorporate professional development opportunities, such as workshops and seminars on topics like time management, resilience and coping strategies. These sessions not only contribute to the personal growth of individual staff members but also enhance the team's overall skill set.

4. Open Dialogue on Mental Health

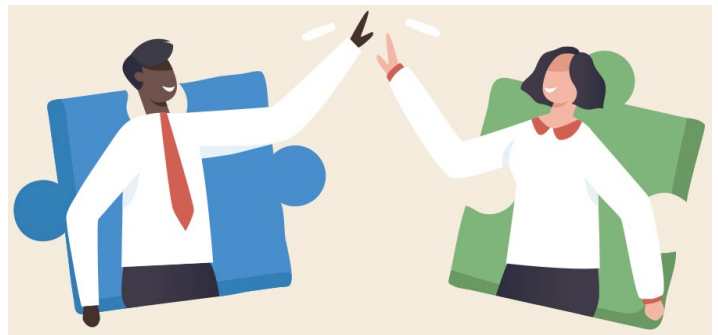
Firmwide retreats provide a conducive setting for open discussions about mental health. Creating a safe space where individuals feel comfortable sharing their experiences and challenges can help break down the stigma associated with mental health issues. This openness promotes a culture of support within the firm.

5. Recognition and Appreciation

Retreats provide an opportunity for leaders to acknowledge the contributions of all staff members. Recognizing the efforts of legal administrators, litigation support professionals and paralegals fosters a sense of appreciation, boosting morale and motivation.

6. Cross-Departmental Collaboration

The collaborative nature of retreats extends beyond legal departments. Legal administrators and attorneys have the chance to partner on team-building exercises, fostering a greater understanding of each other's roles and creating a more cohesive work environment.



7. Renewed Sense of Purpose

Retreats often include sessions that encourage reflection on personal and professional goals. This introspection can reignite a sense of purpose and passion for the legal profession. Participants return to the office with a clearer vision and a renewed commitment to their work.

Additionally, firmwide retreats catalyze innovation within legal practices. These retreats often offer a platform for brainstorming, idea exchange and exploring alternative approaches to challenges. The collaborative environment fosters creativity and cultivates out-of-the-box thinking among legal teams. This collective ideation not only enhances the problem-solving capabilities of individual team members but also encourages a culture of adaptability within the firm.

GOING FORWARD

Firmwide retreats stand as a beacon of hope in the legal profession, offering a holistic approach to mental health and well-being. By prioritizing team-building, stress reduction and open dialogue on mental health, these retreats have the power to transform the workplace culture within law firms.

The positive impact extends beyond the attorneys to include legal administrators, litigation support professionals and paralegals, creating a more inclusive and supportive environment for everyone. As legal professionals return from these retreats with a fresh mind and a renewed sense of purpose, the entire firm stands to benefit from a healthier, more motivated and cohesive team.

ABOUT THE AUTHOR

Ryan Spear, President of Hotels for Trial, is a luxury travel agency owner, mentor, speaker and hospitality professional.

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**BILL & PHIL**

*William Ramsey, Partner,
Neal & Harwell*

*Phil Hampton, Consulting President,
LogicForce*

We Wear Our Sunglasses ... All Day?

Ray-Ban — the iconic sunglasses brand — is now eyeball deep in the smart glasses market with the debut of the second version of their Meta-connected smart glasses.

The first model — known as Ray-Ban Stories — was a miserable failure. But if you know Bill and Phil, you know that when we learned Ray-Ban and Meta (the company formerly known as Facebook) decided to release a new, improved model, we pulled out our credit card and bought a pair. They are a vast improvement over the first model, but Meta and Ray-Ban have more work to do before these smart glasses are a gadget that you would wear every day.

LET'S START WITH THE GOOD...

They look great, and they are available in multiple colors and lens choices, including prescription lenses. You can connect them to Wi-Fi and Bluetooth. If you use them with your phone to make calls or videos, there are five microphones that make you sound good and not muffled. The glasses contain a 12-megapixel camera that gives you decent photo and video quality even though the camera is located on the left hinge of the frame, which makes the pictures and videos look off-center. (Those with long hair may have to worry about their hair covering the camera and ruining their photo or video.) There is also a decent amount of storage (32 gigabytes), and the battery life is fairly solid (five hours on average).

The speakers are nice as well. They are especially clear for phone calls, and they work well as headphone substitutes. Although they do not use bone conduction, the sound is clear while allowing you to hear the environment around you. In addition, others can't hear, as there is no "audio bleed" unless you turn them up really loud.

NOW FOR THE NOT-SO-GOOD...

These glasses commit you to the Meta (Facebook and Instagram) ecosystem. You have to set up the glasses using the Meta View app on iOS or Android. They work best when synced with a Facebook or Instagram account connected to your smartphone, so you

“They are a vast improvement over the first model, but Meta and Ray-Ban have more work to do before these smart glasses are a gadget that you would wear every day.”

are pretty much limited to livestreaming or posting to those accounts. You can also use the app to access your Spotify account.

Additionally, they allow you to use Meta AI, the company's new artificial intelligence digital assistant. However, Meta AI is not nearly as fully developed as ChatGPT, although it does a good job at answering basic questions using the "Hey Meta" command. Meta has promised that it will add internet access and more capabilities to the AI, but we're not holding our breath.

Our biggest concern is the creepiness factor that was also associated with Google Glass several years ago. When you are wearing these Ray-Bans and using the camera, you can pretty much take a photo or video of anything you see. And unlike if you were using your phone, no one will notice. Using the Ray-Ban Meta Smart Glasses could make you feel like a creep or a peeping Tom. When you tell those around you that your glasses can take pictures or videos,

their demeanor immediately changes, even though you let them know that you are only recording when the LED on the lenses is lit.

Still, while these glasses are not revolutionary, they are fun to use. Using the controls on the right-side temple, you can make calls, listen to music, take pictures, create videos and live stream. You can also use voice controls to do all those things.

If Meta follows through and improves the AI, virtual reality and augmented reality capabilities of these glasses, they could be even more fun to play with. Just make sure you give your friends and acquaintances a heads up.

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*.

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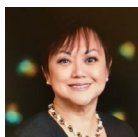
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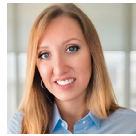
Eileen Africa-Nocom, a member of the Las Vegas Chapter, is now Office Administrator at Wilson Elser Moskowitz Edelman & Dicker, LLP, in Las Vegas, Nevada.



Jennifer M. Carter-Squire, a member of the Calgary Chapter, is now Manager of Human Resources and Facilities at McLeod Law LLP in Calgary, Alberta, Canada.



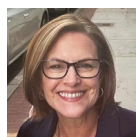
Andrea C. Hill, a member of the Cyber Chapter, is now Firm and Human Resources Administrator at McCarthy Lebit Crystal & Liffman Co., LPA, in Cleveland, Ohio.



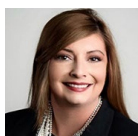
Katherine Lain, a member of the Greater Kansas City Chapter, is now Firm Administrator at Arnold Newbold Sollars & Hollins, PC, in Kansas City, Missouri.



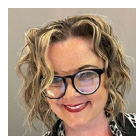
Lynn M. Mattson, a member of the Minnesota Chapter, is now Executive Director at Moss & Barnett in Minneapolis, Minnesota.



Beth McCubbin, CLM, a member of the Raleigh Durham Chapter, is now Firm Administrator at Barrett & Farahany, LLP, in Atlanta, Georgia.



Emily C. Spehar, a member of the Gateway and Southwest Florida Chapters, is now Office Manager for the Sarasota and Naples offices at Wicker Smith O'Hara McCoy & Ford, PA, in Naples, Florida.



Marisa Vanek, a member of the Indiana Chapter, is now Office Manager at Eads Murray & Pugh, PC, in Indianapolis, Indiana.



Congrats Are in Order

Paul Masuret, a member of the Boston Chapter, was recently honored by *Massachusetts Lawyers Weekly* with the Excellence in Law award in the Firm Administration/Operations category. Paul has been Executive Director at Casner & Edwards for 33 years and has successfully guided the firm through office relocations, a recession and a pandemic. Paul has also been a leader at the chapter level, having served as Boston Chapter President from 2006–2007. Congratulations, Paul!

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What's Happening at Headquarters



ALA Celebrates Women's History Month

March is Women's History Month, when we celebrate the vital role women have played in United States and global history. According to the National Women's History Alliance, this year's theme is "Women Who Advocate for Equity, Diversity and Inclusion." Today, when women's rights are under particular attack, it is more important than ever that we recognize the women in our society who are fighting for a more inclusive and just present and future.

In the legal industry, where women's paths for advancement have historically been difficult, numerous trailblazers have paved the way for a more equitable profession, although there are many strides still to be made. ALA is proud that women make up 80% of our membership, and we stand ready to assist and support all our members in their diversity, equity and inclusion (DEI) efforts. To find out more about Women's History Month and download related materials, visit nationalwomenshistoryalliance.org.




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Learn How to Manage Today's Employee Experience

As teams expand and adjust to the constantly changing conditions of the modern law firm environment, today's leaders are tasked with remaining mindful of how these changes influence the employee experience and shape firm culture. Securing talent and streamlining retention efforts are one of the biggest challenges and most critical aspects of optimizing the multifaceted workspaces provided to our teams. In our latest Peek Around the Corner with PDAC, join Professional Development Advisory Committee (PDAC) member Christine Wilbur, MBA, and your ALA peers for an insightful and engaging Roundtable discussion on these topics where you can share your thoughts as we make progress in redesigning today's employee experience. Register now to join on **April 19** at **noon Central** by going to alanet.org/networking/roundtables.

