

LEGAL MANAGEMENT

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How to Build a Meaningful Pride Campaign (And Why It's Important)

Ready to make your firm's Pride campaign have more meaning this year? Here's how to put some extra value into it.





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“
You are a part of a network
of people with great ideas,
deep experience, sharp
acumen, credentialed
professionals, trailblazers,
strategists, leaders and
friends. We come from
all walks of life and have
unique stories. But, we all
belong in ALA.”

We, All of Us, Are ALA

“Alone we can do so little; together we can do so much.” – Helen Keller

The world is changing. Again. Challenges to the legal industry that legal management professionals must overcome have emerged. Again. And the ALA community is here to help. Again.

Whether it is the infusion of transformative technology, another economic downturn, a pandemic, changes to workplace culture, or a host of other challenges over the years, one thing has been consistent: Our peers and colleagues, ALA staff and our business partners have offered innovative solutions, proactive and responsive resources, and a bedrock community of ideas and support. This occurs even though many of our firms compete for the same business, are opponents in the courtroom or compete for the same talent. The bonds forged in the ALA community transcend the things that separate us.

I found that everyone has a place in ALA — even me. When I joined, I was new to the legal management profession. Suddenly, I was swimming with the sharks, so to speak. I needed access to someone who understood my unique position as a legal management professional working with multiple firm owner-operators who needed to focus on the practice of law, learn how to run a business with seemingly odd profitability models and office practices, absorb what it means to operate within a large set of unique rules and ethics guidelines, and manage a staff and legal teams while streamlining operations during an economic recession.

That meant I needed information and education to sharpen my skills. I needed a network of experienced peers to ask questions and gain feedback for my ideas. I needed to know how to identify and align product and service solutions to the challenges I faced. To my delight, I found ALA, where information was given freely and my network of similarly situated peers became suddenly vast — all as a benefit of my

membership. Regardless of where I was from, my background or how much experience I lacked, I found a home in the ALA community. They armed me with what I needed to manage one of the most unique business operations in America: a law firm. In short, I was not alone.

As we evolve in a world with ChatGPT, the metaverse, bank closures, expanding firm ownership models, an uncertain economy, and a world full of exponential change and an uncertain future, remember — you are not alone. You are a part of a network of people with great ideas, deep experience, sharp acumen, credentialed professionals, trailblazers, strategists, leaders and friends. We come from all walks of life and have unique stories. But we all belong in ALA.

I encourage you to invest in yourself by attending one or more of our in-person conferences, joining webinars or

getting involved in a chapter or two. When you do, be sure to ask others to share their ALA stories. And be sure to share yours, too.

According to data analytics company CauseIQ, there are over 46,200 trade and professional service Associations. Many share common roles and attributes such as industry focus, standards compliance or political influence. In the legal industry, ALA is the preeminent organization of legal management professionals focused on the business of law. As members, we have access to resources, provide and share thought leadership and knowledge, and enjoy networking opportunities.

But one thing that makes ALA uniquely valuable is our community of members, staff and business partners. We, all of us, are ALA. And that includes you.

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*Principal and Founder
Research Contract Consultants*

“
What many firms do not know is just how much they’re paying for this lack of transparency — often in the range of six figures or *more*. When jobs and services are on the line, this is simply unacceptable.”

Quit Overspending on Legal Research

No one would choose to overpay for any service, ever. But now especially is a time when firms should be applying extra due diligence regarding overhead expenses.

By the end of 2022, overall demand for legal services had contracted by 0.1% and clients started pulling more work in-house — putting even more strain on law firm financials that were already under pressure from a 24-month-long war for talent that resulted in the highest associate pay increases on record and a related record increase in overhead expenses.

Unsurprisingly, associate and staff layoffs marked the end of 2022 and beginning of 2023: Cooley, Strook, Goodwin and Gunderson are just a few of the big names that have been transparent about their associate layoffs.

It is no surprise that library services are one of the areas hardest hit by staff cuts. While firms grew their staff capacities in other areas, staff was reduced in library and research by 2.5%. These reductions are likely in response to the declining cost recovery of legal research as well as growing overhead expenses: In 2022, legal research was the third largest area of increase in overhead and direct expenses.

Clients are simply less willing to pay for firms’ legal research expenses, while legal research costs are on the rise. What can law firms do — outside of laying off staff — to reign in the expenses of this vital cost center of the firm?

MOST LAW FIRMS ARE OVERPAYING FOR LEGAL RESEARCH

Here’s the thing — most law firms are overpaying for the cost of their legal research platform.

Firms are challenged to make informed decisions to control the costs of their legal research contracts because of the lack of transparency in the pricing and bundling practices of leading products that increase the complexity of procuring just the right

content. As a result, duplicative content, significantly overpaying market rate and underutilized resources are just a few of the common problems library services face when it comes to legal research.

Legal research vendors are not responding with discounts, but rather with uncommonly high increases in renewal offers to existing clients.

What many firms do not know is just how much they're paying for this lack of transparency — often in the range of six figures or more. When jobs and services are on the line, this is simply unacceptable.

Is inflation driving double-digit increases? What happens when the inflation rate drops as it has in the first quarter of 2023? Will increases be reduced to reflect the lower rate?

Not likely. Because of the secretive nature of the pricing practices by legal research vendors, firms already have the near impossible challenge of understanding if their base rate is fair. These new aggressive increases will only compound and accelerate the negative financial effects of unfavorable base contract rates.

HOW FIRMS CAN WIN SIGNIFICANT SAVINGS

Here is what firms can do to combat aggressive pricing tactics of their research providers and start saving the money they've been overspending:

- » **Be aware.** One of the biggest challenges that firms have at the negotiation table is simply being aware of the possibility that they are paying significantly more for legal research services than their peer firms.
- » **Do your due diligence.** Lack of due diligence comes with a price — not just in cost, but also by missing resources potentially helpful to your attorneys. At a minimum, firms need to engage the competing vendor in a meaningful way.
- » **Fact-check scare tactics.** Vendors are going to use scare tactics to plant the seed of doubt about their competitors. If it's a fact, the vendor's marketing department most likely gave the sales force supporting materials to illustrate the point.
- » **Drive the agenda, process and timing of negotiations.** The firm must set a timetable for negotiations that allows time to not only assess vendor proposals, but also provides for a structured transition if the firm chooses to change vendors.



» **Analyze usage under your current contract.** You must understand what content is, and is not, being used in your current contract before you can negotiate a new one. Skipping this step — or not knowing how to do it — means your firm will likely have contracts that include costly content that is never used and not needed.

While 2023 comes with a challenging economic outlook, the biggest takeaway for firms is to do more due diligence with their service providers. Applying the above tactics to combat aggressive vendor negotiations should put most firms in a position to significantly cut back costs — even potentially saving enough to keep your staff intact.

ABOUT THE AUTHOR

Ken Purce, JD, is Principal and Founder of Research Contract Consultants (RCC). RCC clients benefit from Purce's leadership and more than 20 years of expertise and unique insights in the legal research market, derived from his more than 15 years at LexisNexis as the Vice President of Sales, as well as his time as an attorney in New York where he practiced civil and criminal law.

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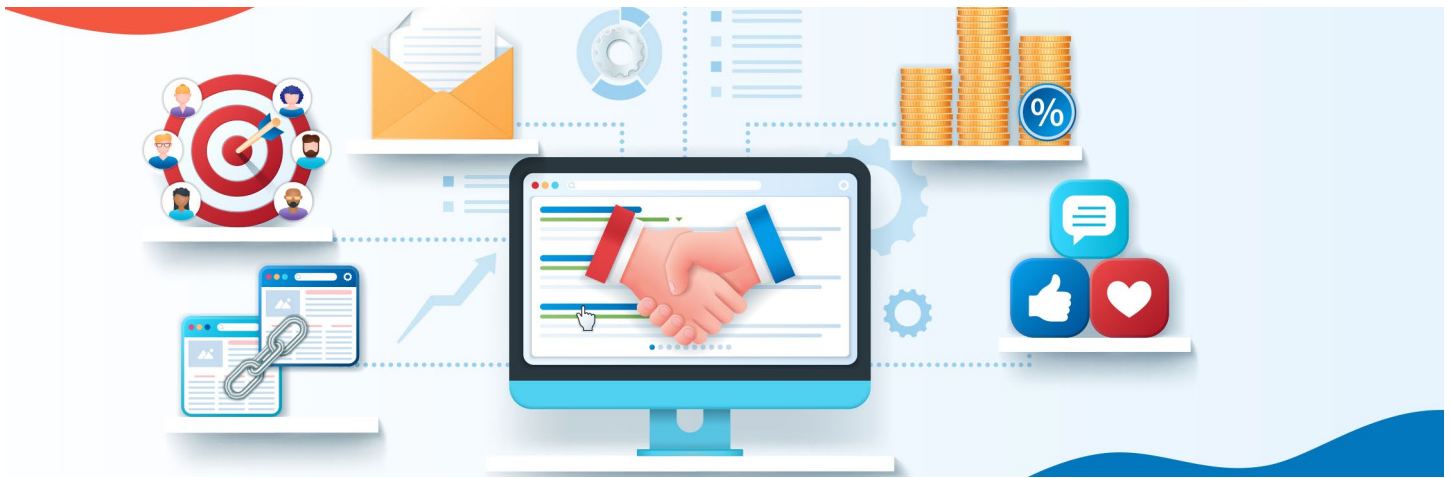
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DAVID H. FREEMAN, JD
*Founder
 Lawyer BookBuilder*

Turning Client Service to Client Matters

Lesser lawyers sometimes win work we feel we should get. Not because they out-lawyer us — but because they out-service us. So, while our lawyers must care deeply about delivering a great legal result, they must also care deeply about crafting a great experience during the client’s journey interacting with us.

Which means our lawyers must master the art of delivering truly differentiating levels of client service — a level of service that creates fierce loyalty, that turns clients in referral-generating machines, and that woos clients away from firms they’re currently using. Great service builds great relationships, which is the precursor to attracting great clients.

Another benefit of focusing on service is it makes our lawyers more comfortable engaging in business development; we are not asking them to “sell” but rather to “serve.” This simple change in nomenclature can unleash more potential interactions with clients, potential clients and referral sources, which in turn can result in more revenue.

Now that we’ve discussed “why” we should care about client service, let’s shift to the “how.” Before we go there, it’s first important to realize that many lawyers already believe they are delivering good service. Good, however, is often not good enough. Good does not build walls around our clients that other lawyers cannot scale. To move from satisfied to loyal, our lawyers must deliver at a higher standard — a “wow” level of service.

Having trained and coached thousands of lawyers over my career, it seems extraordinary service boils down to five areas — what I call the Five Pillars of Delivering Exceptional Service.

1. Know their business.

Sophisticated clients like working with lawyers who know their industry, their business and their needs. They don’t want to waste time educating their lawyers — they want them to

“Good does not build walls around our clients that other lawyers cannot scale. To move from satisfied to loyal, our lawyers must deliver at a higher standard — a ‘wow’ level of service.”

not only know their needs and issues, but also to add extra value by bringing insights they've learned from working with other similar clients.

If certain lawyers have a cluster of clients in an industry, they should learn more about the nuances of that industry. For specific clients, they should know their challenges, their goals and their aspirations. Lawyers can gain this knowledge by reading industry publications, visiting client facilities, attending their strategic planning sessions, co-authoring articles and joining clients at industry conferences.

2. Be highly responsive.

... with an emphasis on *highly*. This may take a bit of work as most lawyers believe they are already responsive. Therefore, you might have to reframe their perceptions. What is responsive? What does it mean to the client, and not the lawyer? What does exceeding expectations look like?

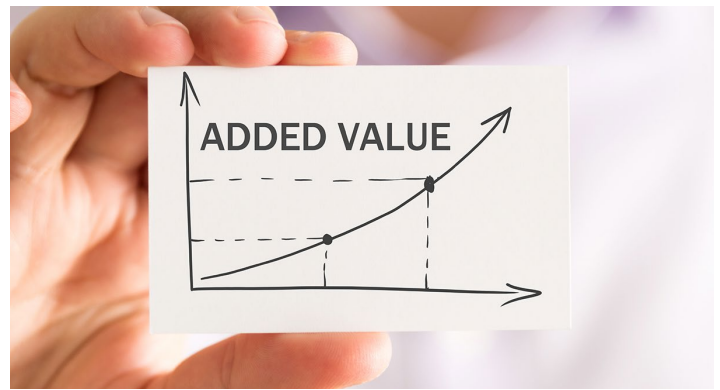
While some lawyers think it's OK to return a client call within 24 hours, certain clients may feel an hour is too long. They'll lose patience and will call the next firm on their list. Here is an exercise you can do with your lawyers: Gather them together and have them brainstorm what it means to be highly responsive. Responsive in a way that differentiates them. This new standard of behavior should open a dialogue that results in new awareness — and hopefully new behaviors.

3. Be proactive.

By the nature of the work, lawyers are generally reactive creatures. An issue arises, clients call and the lawyers respond. But how refreshing would it be to clients if their lawyers acted like they were in-house counsel, charged with *anticipating* everything that should be done in advance to put the client in the best possible legal position. Have your lawyers do this in their own practices and have them talk to lawyers in other practices to learn what they would recommend. (And guess what? This is an elegant way to set up cross-selling opportunities for other parts of the firm).

4. Add value.

Most lawyers can offer legal solutions, but few go the extra mile. Have your lawyers think about what they can do that is above and beyond what is typically expected by clients. Perhaps they can offer in-house training, volunteer to join board meetings, provide updates on legal developments, conduct audits or offer the use of the firm's conference rooms for a client's important meetings. When they go beyond what is expected, clients notice and appreciate it.



5. Manage the relationship.

Expectations are variable creatures, differing from one person to another. Some clients may want weekly update reports, while others don't want to hear from their lawyers. Some may want an aggressive, take-no-prisoners style of litigation, while others want to amicably negotiate mutually agreeable outcomes. Some may want to build personal relationships, while others want to keep everything at arm's length.

The secret is to understand their expectations when opening the matter, to check-in during the relationship to see if any adjustments need to be made, and to meet at the conclusion of the matter to receive feedback. At this point (if things went well), they can ask if there are other areas where they can help. New work is often there — your lawyers just need to know how and when to ask for it.

The overall mindset your lawyers should adopt is to never assume they know what clients want, and to always ask and learn to make sure there is no disconnect between what clients expect and what your lawyers deliver. Then, your lawyers should seek to exceed expectations to activate the "wow factor." Wowed clients are more loyal, they continue to give the firm work and they generate positive word of mouth.

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. He is a two-time best-selling author who has written and co-authored 14 books on law firm leadership and business development and has trained and coached over 10,000 lawyers and leaders in hundreds of firms worldwide. Additionally, he is the creator of Lawyer BookBuilder®, an online, self-study program that shows lawyers how to transform themselves into major rainmakers.

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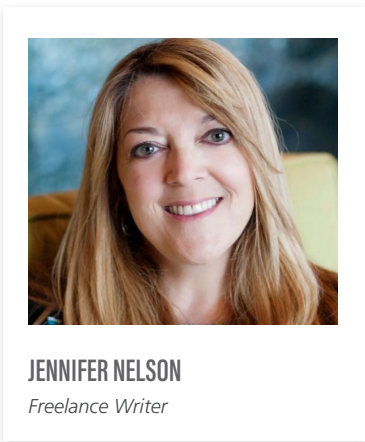
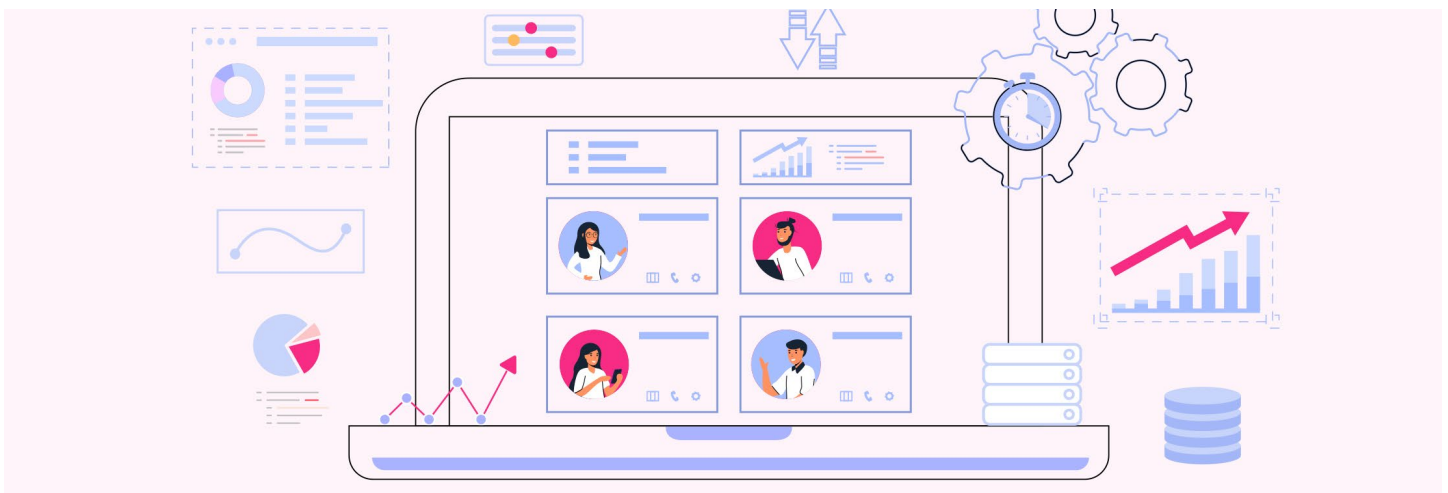
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Staffing Models That Meet the Moment

Many firms are looking to modernize their support models to adapt to a post-pandemic world.

Who could have predicted our circumstances even five years ago? With the advent of technology and workplace tools that allow teams to work over vast distances remotely, the ushering in of a pandemic, and mergers where big firms swallowed midsize firms and midsize firms partnered with smaller firms, every law firm in the country now has the same challenge: How do we support a global footprint across attorneys in a single firm?

“How we got here was an overarching need to increase our efficiencies, to really make sure people were busy, people were well trained, people were being leveraged, and the right resources were doing the right task with a focus on driving more efficient performance.”

Suddenly, you might find yourself with a 1,100 attorney-firm with offices on both coasts of the United States with other international offices. Does it make sense to have a highly local support model where traditional administration supports four to five attorneys in-house? Or is there a better, more efficient way?

The old, traditional model of legal support staff or one legal secretary who supports a few attorneys has gone the way of the dinosaur in favor of newer staff solutions that include resource hubs and networks of legal staff of various skill sets who handle it all locally, regionally or remotely.

THE NEW FACE OF LEGAL SUPPORT

“Once you start peeling off the requirements of the job and handing them to a resource center, or network, you’re looking for an elevated assistant role, an executive type of assistant operating as a quasi-paralegal, and in some instances, some may have paralegal certifications,” says Ben Schmidt, JD, a consultant with Mattern & Associates.

These legal employees are capable of entry point paralegal work, have ease with technology and may be client facing. Furthermore, they may do document review and finalization, create tasks, perform discovery work, run point on marketing and business development, and keep their attorney's practice running smoothly so attorneys can focus on billable hours.

The newly created roles intend to delegate admin functions by skillset, improve efficiency across a firm's workflow and manage client relationships, while keeping the firm financially sound. In other words, welcome to staff models that meet the moment.

"How we got here was an overarching need to increase our efficiencies, to really make sure people were busy, people were well trained, people were being leveraged, and the right resources were doing the right task with a focus on driving more efficient performance," says Denise Dellaratta, Chief Practice Services Officer at Fox Rothschild, LLP, and an Independent member. The firm created an Attorney Resource Center (ARC) to meet their support needs in 2021.

In the Fox Rothschild model, ARC has a pool of 40 attorney resource specialists who support 350 attorneys. Billing is no longer a part of the legal admin's job. Instead, it moved to billing specialists.

"But we do everything from soup to nuts in the resource center, including all of the filings — so state, federal, agency filings, as well as document processing, check requests, conflict checks and opening of a new client matter number," says Karen T. Sargent, CLM, MSHRD, Office Administrator at Fox Rothschild and a member of the Raleigh Durham Chapter.

WHAT DO NEW SUPPORT MODELS LOOK LIKE?

The legal assistant role is often well-compensated, and firms started to lay on many tasks that might be important but not the best use of their skills — like billing or time entry — or the firm's time and resources, Schmidt explains. In a newer staffing model pool or hub, you'd have someone more suited to each role. Then you could divert other work to your highly compensated assistant.

Central hubs are a common model. They can have a centralized function but may not need to be centralized physically, therefore remote. Other models may include elements of both in-office and remote support.

Some models look at whether they can outsource functions. Rather than create the hub or spoke of a network — such as billing, for example — they prefer to outsource to an entity

"There are also ways to support attorneys with more support requirements. You have to figure out how to get that into your model. An admin center can handle many functions, but it may not be able to do everything for everyone."

that does that core function well, like an accounting service. Models may have a mix of outsourced versus in-house or a fully outsourced model for specific functions.

A team model uses teams that handle certain responsibilities and look at different ways to situate those resource specialists. Standard team models may include an admin support team, a practice group team and a document support team that can all work through remote workforce tools.

"There's a lot of different ways to organize staffing models, and a lot of it depends on your firm's culture, footprint and needs and how robust of a function you're looking to [start] up," says Schmidt. Popular things to create within your model include an administrative center and models that handle time entry, billing, document support services or word processing, graphic design, IT, video and others.

"If you were looking at an old model, you would send all that to your assistant, and that assistant would be required to be highly functional and have advanced word processing plus billing plus other tasks in addition to the client-facing individual who is running point for all of your client interactions," Schmidt says. That's a lot to place on one person's shoulders, given the state of legal practice, so it may make sense to specialize and create departments that handle all these functions separately.

ROLLING OUT A NEW STAFFING MODEL

A lot of the success of a new staffing model depends on its rollout and the change management component of it. "In firms that I've either spoken to that have gone down this path or that I've worked with who have done this, they have definitely seen success," says Schmidt. "The ultimate goal is to get the right task to the right person at the right cost."

For a rollout to be successful, Schmidt says you must explain why it's happening, which pain points it solves and do the necessary background work required to ensure the system won't cause too many headaches.

Dellaratta points out that new staffing models are a constant evolution. Court filing and docketing were two of the functions housed in their ARC at first, but they'll be removing them to a new regional group soon. You have to be adept and ready to pivot as the need arises.

Working through attorney behavior, expectations and relationships is part of that rollout experience. When you have an attorney working with the same assistant for 35 years, getting buy-in on new staffing models can take time. On the other hand, attorneys have often worked in firms where a hub or resource support center was the norm.

"There are also ways to support attorneys with more support requirements. You have to figure out how to get that into your model," says Schmidt. "An admin center can handle many functions, but it may not be able to do everything for everyone." Recognizing that is essential.

Dellaratta says that taking time to engage stakeholders so they understand how their practices work and what they need from their support staff is of the first tasks in thinking about changing to a new staffing model. However, it's not a one-size-fits-all approach. "More communication on the front end and more investigation would have been super beneficial to us," she says.

Sargent suggests starting by investing in your employees and training them, regardless of what system or model you're

using now; even if you're not looking at changing your staffing model immediately, that will pay off in the long term.

"Talk a lot with your attorneys, whether about understanding what they need or reassuring them after you've rolled out. Having that relationship with them is huge. Every firm is different, your culture is different, and that has to be factored in to how you design your model."

CONTINUE THE CONVERSATION ABOUT STAFFING MODELS

Delve further into legal staff models with two of ALA's recent Roundtables on that very subject. Join ALA members Denise Dellaratta, Jean Durling and Karen Sargent as they discuss these pertinent topics in "Implementing a Legal Assistant Pool, Parts 1 and 2." Both are available on demand at alanet.org/networking/virtual-member-meetups/roundtables/operations-management.

ABOUT THE AUTHOR

Jennifer Nelson is a Florida-based writer who covers business, finance and legal content. Her work appears in Findlaw, Legal Zoom, NextAvenue.org, AARP and many other publications.

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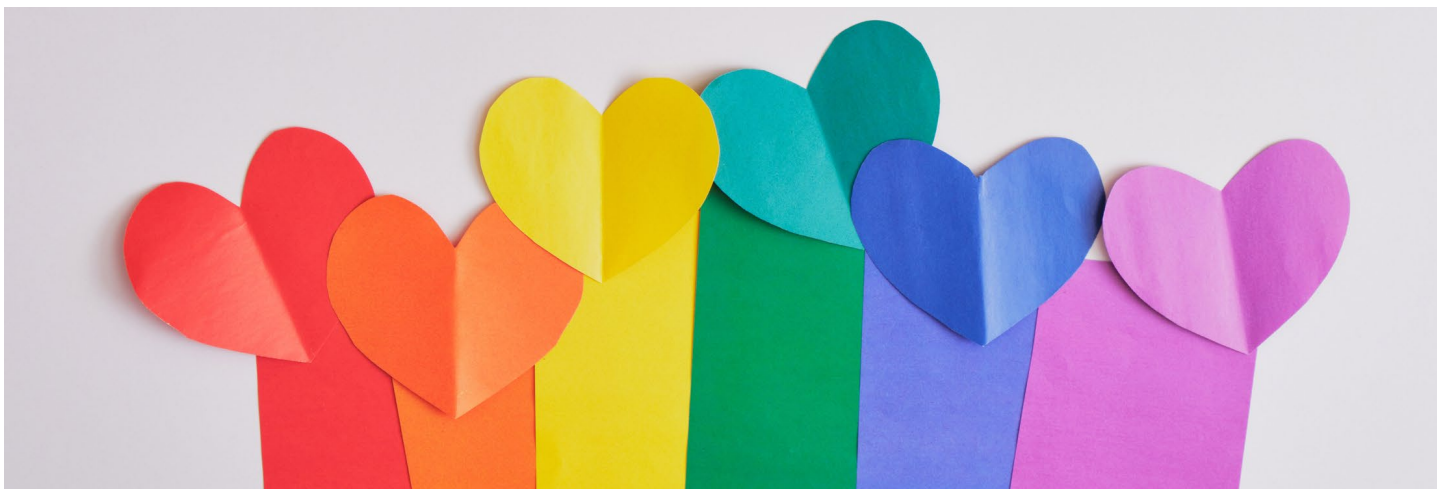
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VALERIE A. DANNER
Senior Managing Editor
Association of Legal
Administrators

“If there are people upset about it, we should have a discussion about that versus trying to calm their sensibilities. [Sometimes] you should feel uncomfortable about things.”

How to Build a Meaningful Pride Campaign (And Why It's Important)

Ready to make your firm's Pride campaign have more meaning this year? Here's how to put some extra value into it.

When Stephen G. Dempsey, CPA, MBA, graduated college in 1985, in San Antonio, Texas, it was still very much a don't-ask-don't-tell world. In 1987, he moved to New York City, landing a job with a large accounting firm. Large was key: The larger the place, the more autonomy. Unless your sexuality caused some kind of scandal, you were well protected. “If somebody else at the office knew, [it] was no big deal, unless you brought it up or you made an issue of it,” says Dempsey, who is the Director of Administration at the Washington, D.C., office at Sidley Austin, LLP, and a member of the Capital Chapter.

His time in New York City was also smack in the middle of the AIDS epidemic. Act Up, the grassroots organization founded in 1987 to raise awareness about AIDS, was just getting started. Though he watched those in his community getting sick and dying from the disease, he knew he couldn't openly do much about it. “If I had been an activist, I definitely would have lost a job,” says Dempsey, noting the policy was unspoken, but he was well aware he couldn't speak out.

It wasn't easy, juxtaposing everyday life with the mortality around him. “There are people around you dying on a fairly constant basis — your peers. I was in my late 20s heading towards 30 and that's not normally when you have peers dying.”

They were dark times for the LGBTQ+ community. Within the context of Dempsey's experience, there's a demonstration of how far the needle has moved for LGBTQ+

“Over 20% of Gen Z is LGBTQ+ and most everyone else has a loved one who is part of that community. LGBTQ+ employees want to work in places where they feel safe, supported and where they feel like they can possibly belong.”

advocacy and health care. In some ways, the LGBTQ+ community has come a long way since those days.

In other ways — and depending on what state you live in — things have reverted as a swath of legislation in certain states target trans youth. As of publication, more than 10 states are on the cusp of banning gender-affirming care, despite such care being backed by decades of research and being supported by every major medical association, according to the Human Rights Campaign (HRC).

Such effort to marginalize exacerbates a current reality: According to research released by the Trevor Project in 2022, 45% of LGBTQ [the Trevor Project does not use + after LGBTQ, so it’s omitted for this statistic citation] youth seriously considered attempting suicide in the past year. Additionally, nearly 1 in 5 transgender and nonbinary youth attempted suicide.

ALLIES NEEDED

Laurence Winters, Chief Community Officer at SurePoint Technologies and the Chair of ALA’s Committee on Diversity, Equity, Inclusion and Accessibility (DEIA), says these laws are not only harmful, but tragic. “[They] represent a lack of acceptance and understanding of diversity and individuality. These actions can lead to the marginalization and discrimination of people who identify as LGBTQ+ and limit their freedom to express themselves and live authentically,” he says.

Additionally, he says it can make your legal operation a hostile environment for those who don’t conform to traditional gender norms and can have negative impacts on their mental health and well-being. “Denying access to education about LGBTQ+ identities and experiences can contribute to a lack of understanding and empathy towards these communities, leading to further stigmatization and discrimination,” says Winters.

It’s marginalization and stigmatization that is personal for Winters. Growing up in a small rural town in Northwest Tennessee and raised in a very religious family, he was raised to believe certain things, including that being gay is an “abomination.” Realizing he was attracted to men created anguish.

“I remember having such an internal battle with myself over those feelings, to the point where I would be on my knees in tears praying to God to make me not feel the way I did because I knew if my family found out, it would be detrimental for me,” he remembers. Those feelings, coupled with immense bullying at school, led him to force himself to date girls through school in an effort to stop the bullying and to do what he thought was the “right” thing.

“It wasn’t until I went off to college that I realized I could no longer live my life to please my family and that I was the way I was, and that God surely wasn’t going to punish me for being who he made me to be. I then started to be my true self, but only in secret,” he remembers. With his undergrad complete, he moved to Kansas to start his career. Living in secret was detrimental to the relationship he was in at the time, so he finally decided to come out and live his life as the person he knew he was.

A MORE MEANINGFUL PRIDE CELEBRATION

With so much at stake for the LGBTQ+ community, if celebrating Pride isn’t on your firm’s calendar for June, it should be. Firms that don’t recognize its importance are at risk of being left behind, says Bernadette Smith, Founder and Chief Executive Officer of Equality Institute.

“Over 20% of Gen Z is LGBTQ+ and most everyone else has a loved one who is part of that community. LGBTQ+ employees want to work in places where they feel safe, supported and where they feel like they can possibly belong,” says Smith.

Winters agrees, noting it’s vital to recognize the LGBTQ+ community’s struggle for equal rights and acceptance. “It is an opportunity to raise awareness about the ongoing challenges faced by LGBTQ+ individuals, including discrimination, violence and social stigma. By coming together during Pride month, LGBTQ+ individuals and allies can show their support for each other and advocate for a more inclusive and equitable society,” Winters says.

Plus, if you’re working to build culture at your firm, celebrating Pride is one way to do that. “It helps build a spirit of camaraderie and connection amongst your employees,” says Smith.

“The most important thing that law firms can do during Pride month is to show their support and commitment to creating an inclusive and welcoming workplace for all employees, regardless of their sexual orientation or gender identity.”

Ready to make your firm’s Pride campaign have more meaning this year? Here’s how to put some extra value and planning into it.

1. Pay attention to legislation in your state.

As noted, there is a swath of bills targeting the LGBTQ+ community. (You can keep track with an updated list from the American Civil Liberties Union [ACLU].) Firms should note if such legislation is occurring in their state — and stand against it.

Even if your firm doesn’t make a statement externally, it should still address it directly with employees. “Send a note to all employees that they oppose the legislation that’s being proposed and being passed,” says Smith. “That’s something that they should be doing all year long, not just during June.”

Winters says firms can harness the power of social media to condemn discriminatory practices, too. “Issue statements condemning discriminatory policies, such as those that seek to eliminate drag shows or restrict the use of pronouns. Work with local LGBTQ+ advocacy groups to lobby for changes in legislation that protect the rights of LGBTQ+ individuals. This can include drafting proposed legislation, meeting with lawmakers to advocate for specific bills and testifying in legislative hearings.”

2. Check your benefits — and your outsourcing partners.

Do your benefits cover same sex partnerships the same as non-LGBTQ+ marriages? Does your health care coverage include gender affirming care? If not, this is a change to make that will not only benefit existing employees but also help attract talent.

“Best in class organizations provide their LGBTQ+ employees with equal benefits. They provide transgender inclusive health care policies and have an antidiscrimination policy that explicitly includes gender identity and expression, and sexual orientation,” says Smith.

It has certainly mattered to Dempsey who says that during his 15-year career at Sidley Austin, he’s always had equal spousal benefits. Moreover, their policies reflect their

commitment to equality, too. And if there is harassment or belittling that happens related to someone’s sexuality, it’s dealt with swiftly and not overlooked.

3. Support organizations making a difference.

Dempsey noted that had he been an activist during the AIDS epidemic, he’d have been fired. Thankfully, that isn’t the case now, as Sidley Austin also supports and donates to a number of groups that uplift diversity, including the HRC.

When a specific community comes under attack, it also offers an opportunity for pro bono work. Winters suggests that firms encourage attorneys to offer such services that are fighting for LGBTQ+ rights, such as Lambda Legal or the ACLU. “By providing free legal services, law firms can help these organizations challenge discriminatory laws and policies,” he says.

This can also mean reviewing your outsourcing partners. “Who are the professional services companies that your firm uses? Diversify your supplier base to create greater equity,” says Smith.

4. Start an employee resource group.

These volunteer affinity groups can be a great resource that brings together LGBTQ+ and ally employees, while building inclusivity into your firm’s fabric. Plus, it’s a great way to get staff engaged and involved throughout the year.



“When you have an LGBTQ+ employee resource group, use them wisely,” adds Smith. “Ask for their support in recruiting more LGBTQ+ employees. Ask for their support in planning events during Pride month and throughout the year. Ask for their input on inclusive policies, or marketing to our community. When you engage your LGBTQ+ employees in this way and ask them to share their opinions about meaningful decisions, it’s going to create greater engagement and a greater sense of belonging at the firm.”

Winters endorses employee resource groups, too, and says firms should not only provide the resources for these groups — but fund them as well. That way, they can hold events that advocate for the LGBTQ+ rights in the firm and the community.

5. Educate, educate, educate.

In 2002, ALA was met with the proposal to offer its first Idea Exchange related to the LGBTQ+ community, Dempsey recalls.

While met with some initial concerns, the “Gay and Lesbian Issues Idea Exchange” took place at the Annual Conference with Dempsey as one of the leaders.

“If there are people upset about it, we should have a discussion about that versus trying to calm their sensibilities. [Sometimes] you should feel uncomfortable about things,” says Dempsey.

Twenty years later, one of ALA’s strategic direction pillars is “to embrace and advance diversity, equity, inclusion and accessibility in our Association and the legal industry.” Today, you not only see DEIA issues at the forefront of ALA’s core direction, but there are sessions, keynotes, webinars and articles in this very magazine devoted to inclusivity. Education is key to pushing movements forward.

Firms can offer training on topics such as pronoun usage, discrimination, bullying and harassment, says Winters. “This can help to create a more inclusive workplace and support LGBTQ+ individuals.”

6. And, yes, continue to celebrate pride.

When June rolls around, it’s time to recognize and celebrate Pride month, your LGBTQ+ employees and the efforts your firm has been undertaking to be an ally throughout the year. There are any number of things your firm can do to partake, says Winters. From flying the Pride flag in your office and/or your email signature, hosting a Pride happy hour, marching in a local parade, to highlighting LGBTQ+ employees and sharing resources to support the community — all are welcome.



DIVERSITY, EQUITY, INCLUSION & ACCESSIBILITY

Embrace and advance diversity, equity, inclusion and accessibility in our Association and the legal industry.

“It’s my greatest hope that no one ever has to feel the way I did and not be able to be their true self or live in fear of being disowned or bullied,” says Winters. “The most important thing that law firms can do during Pride month is to show their support and commitment to creating an inclusive and welcoming workplace for all employees, regardless of their sexual orientation or gender identity.”

Above all, recognize that the work and advocacy must continue when the calendar hits July 1.

“It’s hard won, and it’s not locked in,” says Dempsey.



Need More Info DEIA Measures? ALA’S Committee on Diversity, Equity, Inclusion and Accessibility Is Your Resource

From planning events with ALA’s Annual Heritage and Cultural Celebration Calendar to information on how to be a DEIA Advocate, ALA’s DEIA Committee is here to help you. Visit alanet.org/resources/diversity to look through all the resources we offer.

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“I have been able to start a whole other business, bringing awareness to employment law and employee rights, along with some training, consulting and speaking — because I have someone doing the drafting.”

Are Part-Time Attorneys the Staffing Solution You've Been Looking for?

Some firms are turning to temporary help instead of adding new employees to the payroll — which can potentially offer several advantages.

While 44% of law firms recently told Robert Half they intend to hire full-time employees in the first half of this year, an even greater amount — 78% — are planning to bring contract-based lawyers, legal specialists and other professionals on board through June.

Workers who provide assistance on a part-time or temporary basis can be a solution for firms that want to reduce their staff members' rapidly escalating workloads. This is especially true for firms that aren't sure hiring someone long-term would be necessary — or even possible, due to the tight job market.

Attorney Kiran Gore has brought in temporary help since launching her Washington D.C. firm, the Law Offices of Kiran N Gore PLLC in 2022. Law students and other professionals have handled paralegal and law clerk-type tasks, such as proofreading documents, for a day or more than a week when she's had to quickly ramp up to meet federal court litigation filing tasks.

“The types of cases I take on usually are driven by my personal expertise; it's not really something where I would staff up a firm,” Gore says. “However, I can't do everything at all times — so having that additional support when needed is helpful. For me, it's a scalability solution.”

“We found out that model was actually helpful in terms of getting the work done — and was also profitable for us from a revenue-generating standpoint. So we’ve replicated it a few times since then.”

THE VALUE OF EXTERNAL EMPLOYEES

Freelance legal professionals may also be able to provide expertise that supplements a solo practitioner or law firm’s overall skill set, such as familiarity with another country’s laws or language, Gore says.

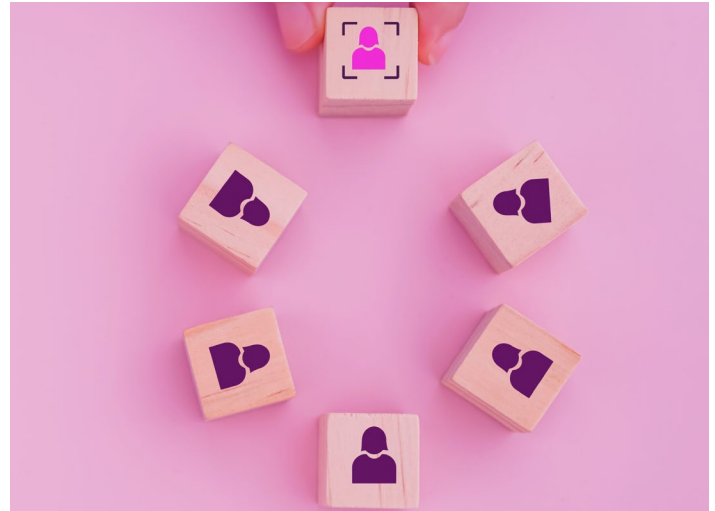
With increased lawyer headcounts linked to an increase in law firm direct expenses in 2021 and 2022, according to Thomson Reuters research, firms may also find temporary roles could help buoy their bottom line.

When Chiquita Hall-Jackson, who felt the associate attorney she’d previously worked with needed more mentoring than she had time to give, decided someone with 10 or more years of experience would be a better fit to draft the complex legal documents her Chicago-based employment law and real estate practice requires, instead of adding a new six-figure salary hire, she began working with a few contract attorneys in mid-2022. She initially planned to delegate cases to them as they came in the door.

While ultimately, one attorney didn’t work out — Hall-Jackson felt they had different ideas of what the position should entail — and another accepted a full-time job with another employer, one contract attorney, who is based in Wisconsin, has been drafting complaints and motion responses, sending out demand letters and completing other tasks for Hall-Jackson and Associates P.C. for almost a year.

Hall-Jackson says he’s also become a valuable asset when she’s considering taking on new cases. “He vets those cases prior to me, and his input has been instrumental as to strengths and weaknesses,” she says. “A lot of times, as an employment lawyer, you take on cases you probably shouldn’t because you just want to help somebody, [or] they talk a good game. It’s been helpful to have that third-party to run the case by. That’s something, when I was looking for a contract attorney, that I did not anticipate getting help with.”

The firm also works with an intake specialist and a paralegal, independent contractors who handle deadline calendar entries, extension requests and other administrative responsibilities remotely, which has freed Jackson-Hall up to perform — and seek out — more work.



“It definitely was a challenge before,” she says. “We actually would stop taking cases three months at a time, at least twice a year, because of capacity. I have been able to start a whole other business, bringing awareness to employment law and employee rights, along with some training, consulting and speaking — because I have someone doing the drafting. And if opposing counseling needs to hop on the phone, someone’s going to intelligently engage in the conversation while I do the things I need to. All of this helps get our firm name out there so we can get more clients.”

A WINNING PROPOSITION

Part-time or project-based help can clearly be advantageous for law firms. Freelance lawyers, though, too, can benefit from the arrangement. Often, it may grant them some flexibility. Hall-Jackson’s contract attorney, for instance, just needs to commit to working a minimum of 20 hours at some point during the month.

Freelance work can be a way for solo practitioners to augment the business their firm takes on independently. “All firms have a low season,” Hall-Jackson says. “This is another way to supplement income.”

Young attorneys can potentially gain valuable real-world exposure to casework through a limited-time engagement — which can potentially also be an opportunity for experienced professionals who aren’t seeking a full-time commitment.

“I come from a background of Big Law, where 80-hour work weeks and being very much beholden to your job is normal.” Gore says. “Part of why I left that model is because I did think that work-life balance is crucial and important. Sometimes people have great skills that they’re not able to put into use simply because they’re not looking for a full-time or permanent position. I see bringing on freelance help as a way to support that kind of talent.”

If the relationship works out, contracting professionals temporarily could even strengthen a firm’s recruiting efforts.

The 10-attorney law firm Rammelkamp Bradney, P.C., which was founded in 1895, actually began utilizing temporary attorney arrangements in 2014 when a lawyer approached the firm about the possibility due to availability in his schedule, according to partner Ryan Byers. The firm placed him on a sizeable pipeline development project that periodically would involve extensive paperwork for roughly six months to a year, followed by a several-month gap in activity, making a short-term hire ideal.

“We found out that model was actually helpful in terms of getting the work done — and was also profitable for us from a revenue-generating standpoint,” Byers says. “So we’ve replicated it a few times since then.”

The firm’s temporary attorneys have generally worked a full 40-hour week but knew their tenure would be limited. Rammelkamp Bradney tried, though, to hire one of the attorneys it had employed on a limited basis. He ended up finding permanent employment elsewhere, but Byers says that’s something the firm is open to.

“You could look at it as a way to test drive an attorney,” he says. “Because particularly at a smaller or midsized firm like ours, you invest a lot of time and resources in onboarding that person, and if it doesn’t work out, you unfortunately have a lot of sunk costs that you’re only getting minimal return on. If you were able to bring in somebody on a part-time or limited-duration basis, it would be an excellent way to screen them for long-term employment.”

ESTABLISHING A SOLID STRUCTURE

Finding a legal professional who’d rather work part-time than permanently isn’t always easy. Byers says his firm has had luck with traditional candidate sources, such as job boards, law schools and word of mouth.

Even if attorneys and support staff members who are brought in temporarily know they’re not being hired, clearly conveying the general timeline you anticipate the work will involve can

“If you were able to bring in somebody on a part-time or limited-duration basis, it would be an excellent way to screen them for long-term employment.”

help align everyone’s expectations — and give the firm some leeway if that estimate changes.

“We have been fortunate that the individuals we’ve brought in for these positions have not really wanted to hold us to a particular timeframe,” Byers says. “When we’ve had the conversation with them, it’s been, ‘This is not permanent employment, but we’re not going to have a hard date where we drop you after three months, either.’ We’ve been able to say we’ll review where we’re at in 60 or 90 days.”

As with any employee, there’s always a risk nonpermanent workers may abruptly leave if they’re offered a more favorable work opportunity — something Hall-Jackson is aware could happen with her contract attorney.

“I’m only giving [him] 20 hours a month; it might be another attorney [saying], ‘Hey, can you do more for me?’ — which will lessen the amount of flexibility [he has] to



assist me," she says. "He also runs his own practice, so it's a possibility that picks up. I always just ask he gives me a fair notice so I get enough time to recruit the next person."

She's hopeful the third-party service she worked with would be able to identify a qualified candidate as quickly as they found him. The provider will also act as a go-between if the arrangement with a contractor ever needs to be changed — which Hall-Jackson says has helped her operate a business model involving part-time virtual team members.

"If I need to say, 'Look, this person's not working out,' or 'We just don't have enough work,' those are conversations I really don't have to have," she says. "There's a third-party to do that for me. If I decide I want to work from home for a week, I don't have to feel bad that these people are sitting in my office. It's the same thing vacation-wise; I can pack my laptop and put in a few hours at a time — knowing that I have some good, qualified people working for me who will get the job done."



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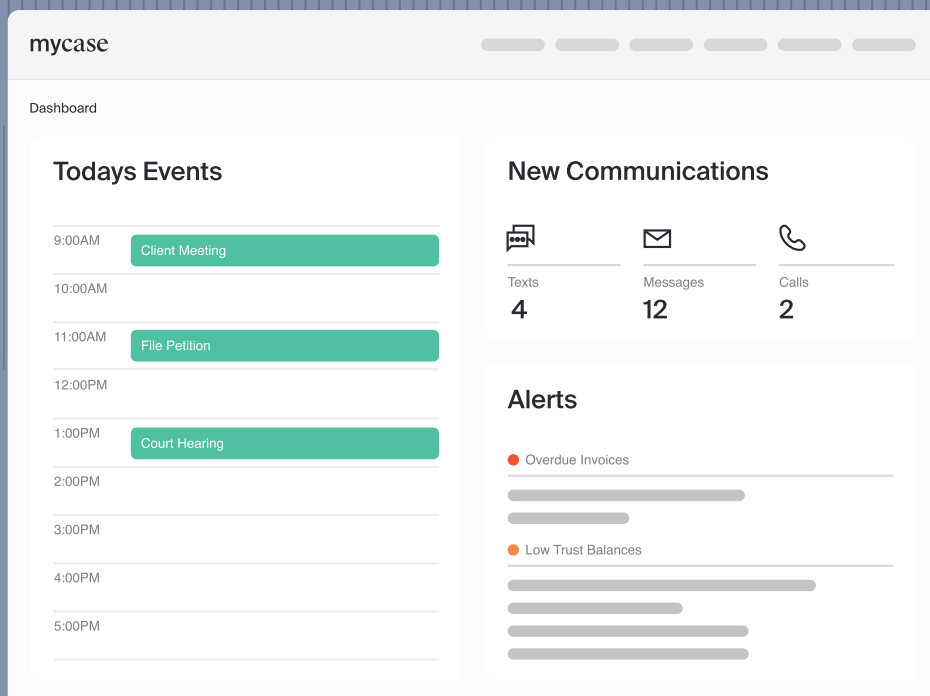


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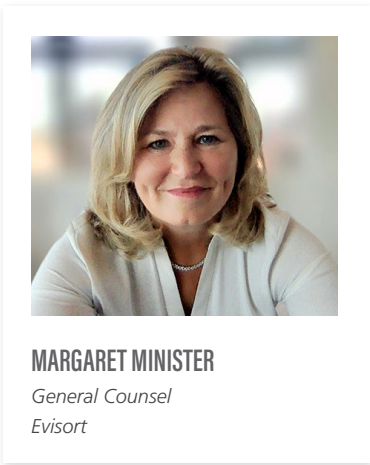
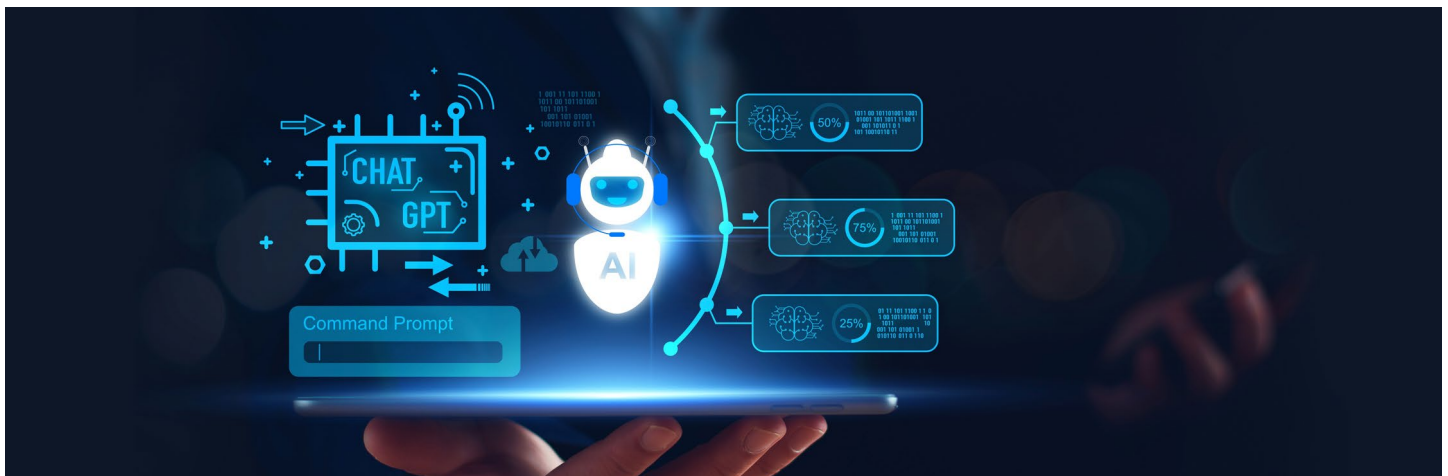
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The Right Generative AI Is a Legal Professional’s Friend, Not a Foe

As generative artificial intelligence (AI) grabs headlines, many legal professionals are skeptical about its capabilities in the legal space. While not all algorithms fit the bill, the technology has significant potential to reshape legal practices.

Many companies already embrace generative AI — Forrester Research believes at least 10% of Fortune 500 companies will generate content with AI tools by 2024. ChatGPT brought the conversation to the forefront when it launched in November 2022. People in all industries are experimenting to see what this technology can do.

“AI is here to stay, and it will provide many benefits. Chief among them: Legal professionals will gain more time to work on more engaging, value-driving tasks.”

We asked ChatGPT about the limitations of generative AI in legal use cases. Its answer listed contract complexity, lack of context and bias. These are critical considerations, but does this mean that generative AI cannot be helpful? No. It means legal professionals need the right tool trained on the right data to accomplish objectives effectively.

AI has reshaped knowledge management across industries, from supply chain optimization to customer service to contract management. Legal professionals are now using it to improve workflows and analyze data for contract intelligence.

According to Deloitte, businesses using AI-powered contract lifecycle management (CLM) tools cut contract management costs by 60%. Automation reduces manual work, facilitates collaboration, and helps lawyers and businesses close deals faster.

Consolidating your documents into one repository creates a single source of truth, putting information at your fingertips. With AI, you can quickly find and analyze obligations, renewal terms, vendor relationships, payment clauses and compliance provisions, among many other data points. Meanwhile, lawyers can spend more time on strategic tasks that will promote the broader goals of companies and clients.

Now that legal professionals have experienced AI's power, they will demand more automation and intelligence across the contract lifecycle. The next step is AI that adapts to company-specific needs. Generative AI can fill this need — provided it is trained on a robust and customized dataset.

HOW GENERATIVE AI HELPS LEGAL

Generative AI's potential is limitless in the legal space. Legal professionals can use the technology to draft, redline and negotiate contracts. When trained on your contract database, the algorithm learns a company's risk tolerance, standard language and acceptable alternative terms. This knowledge enables generative AI to identify untenable and risky clauses and recommend replacement language. While the machine does the tedious labor, users can easily review and approve the suggestions. That part is key — this technology isn't fool-proof. It still requires humans to review what it generates.

Leveraging AI to reduce review time, edits and back-and-forth negotiations accelerates deal approval, giving your client or business a competitive advantage. You can also use AI to identify what contract language is or isn't helping close deals.

AI will not replace or replicate legal professionals' roles. Instead, generative AI will expand your capabilities, allowing you to do your job better and more efficiently while accelerating deals. The time saved by automated negotiation will enable you to think more critically about contract nuances and how to use contract intelligence to drive business.

MAKING IT SUCCESSFUL

We've seen generative AI's power through algorithms like ChatGPT. These capabilities are incredible, but general all-purpose tools will fall short for legal professionals. To be truly useful, an algorithm must be customized.

Rule-based approaches work well for standardized templates, but many contracts contain nuance beyond what these methods can reasonably master. Generative AI trained on general datasets will not provide the specialized information legal professionals require. Instead, AI-powered CLM must learn specifically from your contract portfolio. With the wealth of knowledge contained within, the technology can ascertain language preferences for different scenarios. For example, a contract with an entity in the European Union needs different clauses than an organization in New York. If trained on the right information, generative AI can identify the differences.

Remember: Legal professionals are the company's true value driver — not AI. Therefore, generative AI must work with and for people. Algorithms should be transparent so humans can

see and understand the data behind their recommendations and manipulate the process to generate better outputs. People control the data, not the other way around.

As always, change can be scary, so when introducing AI, leaders should be sensitive to their employees' concerns and needs. Legal professionals will require reassurance, which management can provide by outlining what the technology does and does not do and offering training and professional development. Knowledge helps employees feel more comfortable and empowered to use the technology.

AI is here to stay, and it will provide many benefits. Chief among them: Legal professionals will gain more time to work on more engaging, value-driving tasks. We can already use AI to gather and analyze data, and applying generative AI to negotiation is only the beginning. Future capabilities could include drafting entirely new contracts, automating compliance updates and managing supply chains.

We are only at the beginning of AI's commercialization. Legal professionals must be aware of the requirements and pitfalls of the technology to successfully apply it in legal practice.



STILL CURIOUS ABOUT CHATGPT AND LEGAL?

Check out the first episode of A Peek Around the Corner with PDAC, our new *Legal Management Talk* podcast series, where Matthew Sullivan — Chief Operating Officer at Sullivan Law & Associates, Founder and Chief Executive Officer of consulting firm Unravel Legal and a member of ALA's Professional Development Advisory Committee (PDAC) — discusses how ChatGPT and other forms of generative AI can improve efficiencies at firms as well as ways legal administrators can use this tech now. Give it a watch on our YouTube channel or download the audio version wherever you get listen to your podcasts.

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*Master of Science in Law Program,
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Why Law Training Is Critical for Your Administrative Staff

In the legal industry, we often talk about training as if it is only meant for lawyers. From continuing education to adoption of new business management and technology tools, there is often pressure on attorneys to keep up and adapt. This can be frustrating — not only to the lawyers who are struggling to learn the latest technologies or operational procedures, but also for the other legal staff who are often charged with helping the business move forward by implementing new policies and processes.

“When employees in your organization have a better understanding of the law, the legal industry, and the implications of law and regulation on your business or client relations, the entire enterprise is better equipped to benefit from cross-team collaboration, efficiencies and compliance.”

Following through with training and professional development shouldn't be a one-way street, but rather, a partnership. The Association of Corporate Counsel (ACC) acknowledges the importance of professional staff training in their 2023 Chief Legal Officers Survey Report: “Legal department staff need to be aware of business operations and business stakeholders also need to be attuned to basic legal processes and requirements,” the report says. “Education and training on both sides can help better align legal services to business strategy and therefore improve client satisfaction.”

In a nutshell: It's time for everyone to start training up.

The next time your law firm or legal department starts to evaluate new policies, technologies and overall business practices, consider a more 360-degree approach to professional development. Law training for staff who don't practice law is one way to achieve that. Here's one place to start: Law degrees for legal administrative professionals.

In the past decade, a new type of master's degree has emerged in the legal space for administrative professionals who want to level up their performance and learn new skills. More than 100 higher education institutions that offer these programs are catering to professionals who could benefit from legal education, but don't have the need or desire to be a practicing attorney. Students enrolled in these law school programs learn about contracts, compliance, regulation, intellectual property and other areas that can help to bridge the gap between the legal team and the firm's other functions.

WHO BENEFITS FROM LEGAL TRAINING?

A degree in law can benefit employees across any organization — and it can positively impact your overall legal operation. When employees in your organization have a better understanding of the law, the legal industry, and the implications of law and regulation on your business or client relations, the entire enterprise is better equipped to benefit from cross-team collaboration, efficiencies and compliance.

From human resources to IT and operations, here are four areas where employees with legal training can positively impact your team and why it's imperative that you have them on board.

1. IT and Operations

A recent article from International Technology Legal Association (ITLA) talks about the importance of integrating IT staff into the legal functions of a law firm to help with project implementation and outcomes. While “embedding tech folks into legal ops,” as the article describes, is a practical method to help lawyers and support staff get on the same page, how much easier would it be if your legal and operations teams went into these collaborations already speaking the same language?

2. Contract Review

Students who go through legal master's programs come out with the ability to understand the law and manage key elements of legal-based projects, such as contract drafting, review and implementation. Having legal administrators on board who can manage and help implement contracts is a great time-saving tool for attorneys who need to stay focused on client work — and one doesn't have to be a lawyer to be effective at this.

3. Vendor Management

When legal administrators are able to understand contract terms, it allows for smoother interaction with company vendors and a better understanding of negotiated services. Staff who understand contracts can help to ensure deliverables are met, negotiate favorable terms and provide more comprehensive oversight of business partnerships.

4. Business Regulation

Regulation impacts all areas of a business, not just the legal department. Your business may have to comply with laws and regulations around data and privacy, consumer disclosures or



e-discovery. These regulations may differ based on the location of your offices or the industry your organization represents. Having team members in place who can understand regulation can be instrumental in maintaining organization-wide compliance.

ENCOURAGE EMPLOYEES TO RAISE THE BAR

The onus often falls on attorneys to learn the latest in business, regulation and tech, but it doesn't have to be that way. Administrative employees can now study law in a way that best suits their interests. By supporting your employees who want to take on some form of legal education, you are guaranteed to improve your organizational outcomes.

ABOUT THE AUTHOR

Kelly F. Zimmerman is a former Managing Editor of *Legal Management*. After wrapping up her time with the magazine and ALA, she spent several years as an editorial lead in the fintech space, where she learned firsthand how to cross-functionally collaborate with legal and compliance teams. In 2022, she returned to the legal industry and now works for the Master of Science in Law Program at Northwestern's Pritzker School of Law.

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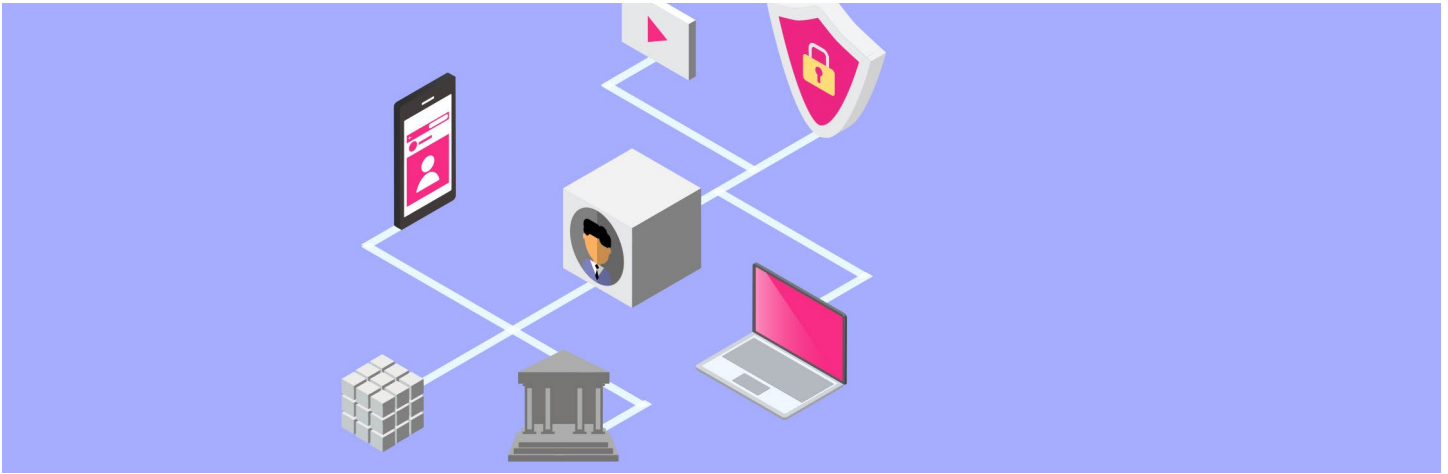
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Key IT Services to Succeed in Today's Competitive Legal Landscape

From managing confidential data to providing secure client communication, technology is essential to law firms. Yet, many legal organizations lack the necessary IT resources to succeed in today's competitive legal landscape.

“Cybercriminals are getting more sophisticated in their attacks, and law firms are one of their most sought-after targets. All that confidential data appeals to hackers and identity thieves.”

That's where reliable law firm IT services can help. An IT service company remotely handles the technology needs of a law firm and ensures its systems are secure, stable and up to date. This allows law firms to focus on what they do best — providing legal services — without worrying about the health of their technology.

So, which IT services should a law firm consider? Here are five of the most important ones:

CYBERSECURITY SERVICES

Cybercriminals are getting more sophisticated in their attacks, and law firms are one of their most sought-after targets. All that confidential data appeals to hackers and identity thieves. In fact, roughly 30% of law firms in the United States report being hacked each year.

A reputable law firm IT service provider will help minimize the risk of a data breach or malicious attack through robust cybersecurity services. These services may include (but are not limited to) the following:

- » Firewall installation and configuration
- » Proactive monitoring of security systems
- » Data encryption and password protection
- » Incident response planning
- » Employee training on cybersecurity best practices

Such services can provide peace of mind to a law firm, knowing its network is better protected from malicious actors.

CLOUD INFRASTRUCTURE SERVICES

Today, many law firms are storing their data in the cloud. By doing so, they can access their data from anywhere at any time, making it easier for teams to collaborate and streamline operations.

However, setting up a reliable and secure cloud infrastructure isn't easy — especially for smaller firms with limited IT resources. That's why many law firms have turned to professional cloud infrastructure services. Such services provide the necessary tools to implement, manage and scale a firm's cloud-based solutions in line with their demands.

Many law firm IT service providers also provide cloud migration services, making the transition from on-premises to cloud-based solutions seamless and hassle-free. This helps firms take advantage of the latest cloud technology with minimal disruption to their business.

DATA COMPLIANCE

Data compliance is a must for law firms, as they are responsible for keeping their clients' data secure and private. Law firms must implement secure systems and processes to ensure they remain compliant with data privacy regulations.

A law firm IT service provider can help in this regard. They will ensure that the firm's systems meet all necessary requirements for protecting sensitive data. This includes encrypting data at rest and implementing access controls, among other measures.

In addition, the service provider can also help law firms stay aware of changing regulations and best practices. This is key for avoiding costly fines due to noncompliance or data breaches that could damage a firm's reputation and result in long-term financial losses.

DEDICATED IT SUPPORT, 24/7

Each minute counts in the legal profession. A delayed response to a client request or a missed deadline can have serious consequences for a firm. That's why it's essential for law firms to have dedicated IT support that is available 24/7/365.

A good law firm IT service provider will provide quick and reliable support for any technology-related issues or queries. By having a dedicated team of IT professionals on hand, law firms can ensure their systems are up and running quickly in the event of an outage or other technical issue.



Moreover, many IT service companies can often fix or diagnose an issue remotely, meaning law firms don't have to wait for a technician to visit their office. This further reduces downtime and allows legal professionals to focus on their work without disruption.

STABILITY

Technology is constantly changing, and law firms must keep up with the latest tools and trends to remain competitive. That's why IT services often include regular maintenance and upgrades to ensure a firm's systems are stable and secure.


A good law firm IT service provider will regularly review a firm's technology infrastructure and provide proactive support. This includes patching systems to the latest version, updating software and keeping hardware well-maintained.

Law firms require reliable and secure IT systems to stay competitive in today's legal market. By enlisting the help of professional law firm IT service providers, they can ensure their technology is up to date, compliant with applicable regulations and running smoothly. Then, law firms can have peace of mind that their data is well-protected — and the tools they need to focus on their work with little to no disruption.

ABOUT THE AUTHOR

Kevin Haight is the General Manager for WAMS, Inc., a full-service managed service provider specializing in law firms. He has a background of over 25 years in the legal industry and understands software and the demands that come along with it.

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**CHRISTINA FLOYD AND
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“
In the current economic environment, law firms seeking new, creative ways to acquire the equipment they need may find leasing a more cost-effective and beneficial option than purchasing outright.”

Why Leasing Equipment Is a Smart Move in an Uncertain Economy

As the Federal Reserve continues its efforts to slow the economy and fight inflation, it is not a surprise that interest rates are expected to increase throughout 2023. What may come as a surprise, however, is that despite rising rates, investment in capital expenditures (CapEx) is on the rise as well.

According to Deloitte's Q4 2022 CFO Signals, in 2023, 66% of Chief Financial Officers (CFOs) plan to allocate or reallocate capital to new business investments. These investments are necessary to increase efficiencies, maximize profits and stay ahead of the competition — but in the current economic environment, law firms are seeking new, creative ways to acquire the needed equipment.

WHY FINANCING NOW MAKES SENSE

Despite increasing interest rates, capital project financing is on the rise. Below are reasons why leasing equipment may make more sense than ever:

- » **Pay for Use, Not for Ownership:** A lease allows you to pay less than the cash purchase price for the equipment and avoid other indirect costs of ownership, like ongoing maintenance.
- » **Build in Cost Certainty:** Leasing provides budget consistency, with fixed monthly payments that are spread out over time. Lease agreements typically offer the lowest monthly payment, giving you access to a lower cost of capital.
- » **Take Advantage of Accounting Benefits:** Operating leases are capitalized on your balance sheet for less than the asset's true cost, and you can claim the entire amount of the lease rental payment as a tax deduction.
- » **Use Cash for Other Opportunities:** With leasing, more cash is available to move to better-performing investment options. Cash can also be better leveraged for critical business initiatives, like hiring and retaining your top talent.

HOW TO GET AHEAD OF RATE INCREASES

To protect your budgets from these imminent rate hikes, consider the following:

- » **Rate Locks:** Build predictability into your budget by securing your rate from the start. Your cost of funds on the day you sign your proposal will be the cost of funds when you close.
- » **Step Payments:** Begin with minimal payments that increase over the life of your lease, with the flexibility to choose when you would like payment increases to occur.
- » **Cash Reimbursement:** A cash reimbursement for purchases made within the last 12 months can help you preserve your cash position, manage bank covenants and pay down high-rate debt.

In the current economic environment, law firms seeking new, creative ways to acquire the equipment they need may find leasing a more cost-effective and beneficial option than purchasing outright. Despite increasing interest rates, financing investment in CapEx is on the rise, and leasing offers several advantages, such as cost certainty, accounting benefits and cash availability for other opportunities. Choosing to finance your firm's upcoming projects through leasing can be a smart choice in navigating the challenging economic landscape ahead.

ABOUT THE AUTHORS

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

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

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Sending Our Condolences

ALA is saddened by the recent passing of **Erin Walsh**, who was approaching 20 years with ALA and was a member of the Greater Los Angeles Chapter. We send our condolences to Erin's family, friends and colleagues.

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What's Happening at Headquarters

Participation Is Now Open for ALA's 2023 Compensation and Benefits Survey

Recruiting and retaining talent is top of mind these days, and you need all the tools you can get to make it happen. The 2023 Compensation and Benefits Survey and its companion, the 2023 Large Firm Key Staff Compensation Survey, can help. Both are now open for participation, and the results will provide the comprehensive information you need on law firm salaries, benefits, staffing ratios and turnover.

Plus, this year's survey will include additional data in benchmarking and law firms. Your involvement is crucial to making the report a success. You will only need to update last year's data if you participated in the 2022 survey. Email compsurvey@alanet.org for any questions or if you need assistance, and visit alanet.org/compsurvey to participate or preorder this year's report.



Don't Miss the Chance to Earn Your Virtual Coaching Certificate!

ALA's **Legal Virtual Coaching Certificate Program: Elevate Your Life, Leadership and Career** will help strengthen leaders by creating a vision for their life and career. Join Whitnie Wiley and her team on **June 20–21** to learn how to develop the mindset needed to take action and leverage a plan with the resources, strategies and tools available to you.

The program is an interactive training course comprised of two, four-hour instructor-led sessions over Zoom. Due to the interactive nature of this course, it will be limited to a maximum of 50 participants. Visit alanet.org/virtual-coaching to learn more and register.

Check Out Our Latest Podcasts: ChatGPT, Effective Allyship and Difficult Conversations

Want to learn more about ChatGPT, having difficult conversations with your employees or being an effective ally for diversity and inclusion? Look no further than the latest episodes of *Legal Management Talk!* ALA's podcast covers all these topics and more to get you what you need to know to run your firm. Visit alanet.org/podcast to watch every episode or download them wherever you get your podcasts.



What's Happening at Headquarters



Register Now for ALA's 2023 Chapter Leadership Institute

Head to New Orleans to join representatives from nearly 60 ALA chapters at the 2023 Chapter Leadership Institute (CLI) taking place from **Thursday, July 20**, through **Saturday, July 22**. Come network and collaborate with current and new chapter officers, individuals interested in becoming a chapter officer, and members of ALA's Board of Directors and Chapter Resource Team.

Participate in sessions covering chapter membership growth, budgeting, inclusiveness, effective communication and much more! And be sure to visit New Orleans' famous Bourbon Street, listen to some jazz and eat some tasty beignets. Visit alanet.org/cli to register.

Become a Mental Health First Aider This Summer

There are still openings for this summer's Mental Health First Aid program, an interactive training course comprised of 2-hours of self-paced content (to be completed online independently prior to the live session) and one 6.5-hour instructor-led session over Zoom. The one-day training program will be offered on four separate Fridays in June and July.

Due to the interactive nature of this course, there is a maximum of 30 participants per offering, so register now by visiting alanet.org/mhfa before spots fill up! Attendees are eligible to receive 7.5 credit hours toward their CLM certification.



Hone Your Leadership Skills at ALA's Executive Leadership Summit

Save the date! ALA's Executive Leadership Summit will be held September 29–30 in San Diego, California. Attendees will learn new approaches in strategic thinking, change management, project management, and more. Go to alanet.org/ELS to learn more, and keep your eyes peeled for registration info coming soon!



Looking For Annual Conference Coverage? Stay Tuned!

Be sure to check out our June issue for complete coverage of ALA's 2023 Annual Conference & Expo from Seattle. We'll feature plenty of photos from on-site as well as a complete list of this year's award recipients. Check your inboxes on June 9.