

# LEGAL MANAGEMENT

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Conversations on mental health, artificial intelligence and progressive recruitment will continue to be top of mind for the legal industry in the new year.





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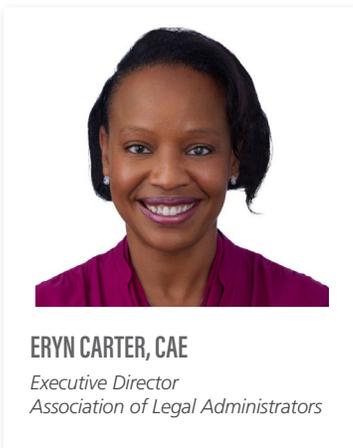
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**ERYN CARTER, CAE**  
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## Unwrapping ALA's New Strategic Direction

**It's hard to believe that we're already approaching the holiday season and 2024 is right around the corner. If you're like me, that means you're probably busy assessing and celebrating all that you've accomplished this year and planning your priorities for the upcoming year.**

ALA is also looking toward the future, starting with our 2024–2026 Strategic Direction. The Board of Directors has worked diligently to create an aspirational, future-focused road map for the Association that reflects what our members need now and how ALA will best help them succeed in the years to come.

“The Board of Directors has worked diligently to create an aspirational, future-focused road map for the Association that reflects what our members need now and how ALA will best help them succeed in the years to come.”

As part of the new Strategic Direction, there are now five key focus areas that will guide our future planning: Member Experience; Diversity, Equity, Inclusion and Accessibility; Education and Professional Development; Impact; and Innovation. Each focus area has specific success indicators that will ensure we are achieving our goals. Underneath each success indicator are the strategies and tactics that will be developed and implemented by the Board of Directors and ALA headquarters staff.

Much more about the Strategic Direction will be discussed in the coming weeks and months, but I'd like to point out a few highlights:

- » The diversity, equity, inclusion and accessibility (DEIA) focus area now emphasizes the importance of fostering a welcoming environment where everyone feels like they belong. We aspire to achieve this at all levels of the organization.
- » Impact is a focus area that turns our attention toward elevating all the amazing things that our members are accomplishing in legal and how we can support them.
- » Innovation is a new focus area for ALA that we're really excited about. We want to highlight the fact that ALA members are innovators, and we want to center them in conversations that focus on how legal organizations are and can be successful.

The Board has also crafted new vision and mission statements for ALA, which help provide a baseline for what our organization stands for and hopes to achieve on behalf of our members. These will be published soon on [alanet.org](http://alanet.org).

The academic Henry Mintzberg once said, "Strategy is not the consequence of planning, but the opposite: its starting point." I believe that the new Strategic Direction is not an end goal, but a foundation upon which ALA can build its events, craft its educational programs and keep our members informed

and engaged. With this road map in place, I am excited for the future of ALA and the many ways we can support your professional success and growth.

***May you have a joyous holiday season!***

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# Automation Is Crucial to Improving the Client Lifecycle

**Confession time: I'm *that* attorney in my 40-lawyer firm. I onboard clients, dive into the matter and sometimes forget to tie up the loose ends when it's done. It's not intentional neglect — sometimes it's just me holding onto the hope that the matter might rekindle. But the aftermath is a muddled conflict check process brimming with half-forgotten client names.**

It's a symptom of a larger issue: Many lawyers are missing chances to automate and refine the client lifecycle. Though a plug-and-play fully automated lifecycle remains a dream, integrating technology we already have can work wonders. Here's a glimpse into automation opportunities at each client lifecycle stage.

“Automation is no longer a luxury — it's becoming the backbone of a modern legal practice. As clients grow more discerning and the competition rises, leaning on technology isn't just smart, it's imperative.”

## Stage 1: Client Engagement and Conflict Check

The initial client meeting will set the tone of the relationship. By automating these initial processes, law firms can fast-track onboarding with a polished, professional interface to new clients. For example:

- » Tools like Microsoft and Google Forms can standardize the intake forms, ensuring uniform data collection and preventing human error.
- » Your billing or practice management software can run conflict checks, scanning the entire firm database to pinpoint potential conflicts, ensuring that the firm steers clear of ethical pitfalls.
- » If you augment a conflict database search with an email query, try adding embedded responses through Google or Microsoft Forms rather than collecting a bunch of email replies.
- » Set up electronic payments as part of the engagement with document automation software.

- » Simplify engagement letter execution with DocuSign, Dropbox Sign or similar tools.

Automation buttons up the client relationship, painting your firm in a highly professional light.

## Stage 2: Time Capture and Fixed Fees

Remember the Jetsons? Their lawyer probably had self-filling timesheets. We might not be there yet, but evolving billing software makes time capture seamless. Here's how:

- » Look for billing software that allows you to enter time wherever you are: web-based, desktop and mobile. Timers are critical for some lawyers. The software also needs the flexibility to accommodate fixed and hybrid fees and other ways your matters might be set up.
- » Tools that bring in potential billable information from your calendar, documents, email and phone are enticing but can also bury you in useless information. Try to find a balance where you get the right information, but not a flood.

With modern software, tracking time, fees and expenses should be almost effortless, allowing attorneys to focus on practicing law.

## Stage 3: Invoicing

The industry is shifting toward a fully electronic billing workflow. That is, time entries are turned into drafts, reviewed and approved, and then sent and paid — all electronically. Any other method costs more time and money. Your billing software should facilitate electronic review and invoice delivery. This is a critical workflow that should be at the top of your list when evaluating software. Here are some tips:

- » The 80/20 rule applies: If you can get 80% of the firm's attorneys using electronic invoicing, it's fine if a few senior folks continue to review paper drafts.
- » Invoice emails should be professional-looking and configurable with graphical payment links. The email should automatically add things like the invoice, a trust statement if applicable, a matter summary, invoice summary and other information to help the client understand the matter status. For bonus points, the invoice email should incorporate client-specific notes or details to offer a personal touch. These elements will reduce client billing questions.
- » Your software should have the ability to track invoice emails (if they've been sent, received, opened and paid) and send automated reminders for unpaid invoices. These are handy features for your staff who are chasing receivables.

The result? Better, faster invoices and improved cash flow.

## Stage 4: Payment

Electronic payments are the future — having a simple payment link is no longer enough. In your payment workflow, look for:

- » Smart payment links that discern the invoice amount and balance due.
- » Automated reconciliation tools that match received payments with invoices, ensuring the accounts are always up to date.
- » Automated deposit management and accounting ensuring that payments are allocated properly to trust and operating accounts as well as the proper accounts in your accounting software.

An efficient system not only streamlines your finances, but also bolsters client satisfaction with hassle-free payment options.

## Stage 5: Matter Closure and Database Cleanup

Concluding a case often opens another can of worms: archiving and compliance. Automation can effortlessly archive matters, periodically cleanse databases and flag important follow-ups. These strategies cement a firm's readiness for future engagements and possible audits.

Furthermore, automation is no longer a luxury — it's becoming the backbone of a modern legal practice. As clients grow more discerning and the competition rises, leaning on technology isn't just smart, it's imperative.

Automation is about transformation — not just speed and efficiency. Automation liberates attorneys from mundane tasks, letting them dive deeper into legal mastery and client relationship-building. And for folks like me? With apt automation, maybe I won't be *that* attorney anymore.

### ABOUT THE AUTHOR

**Gary Allen** is a Founder and Head of Operations at LeanLaw, a legal timekeeping, invoicing and reporting software company, as well as a partner at Givens Pursley LLP where he has practiced law for 30+ years. He was only three years out of Stanford Law School when the firm he was working for imploded. It happened again three years later. He was left without a job. Those experiences created a passion in Allen to help law firms be better businesses, with efficient operations, streamlined financial management and a laser focus on profitability.

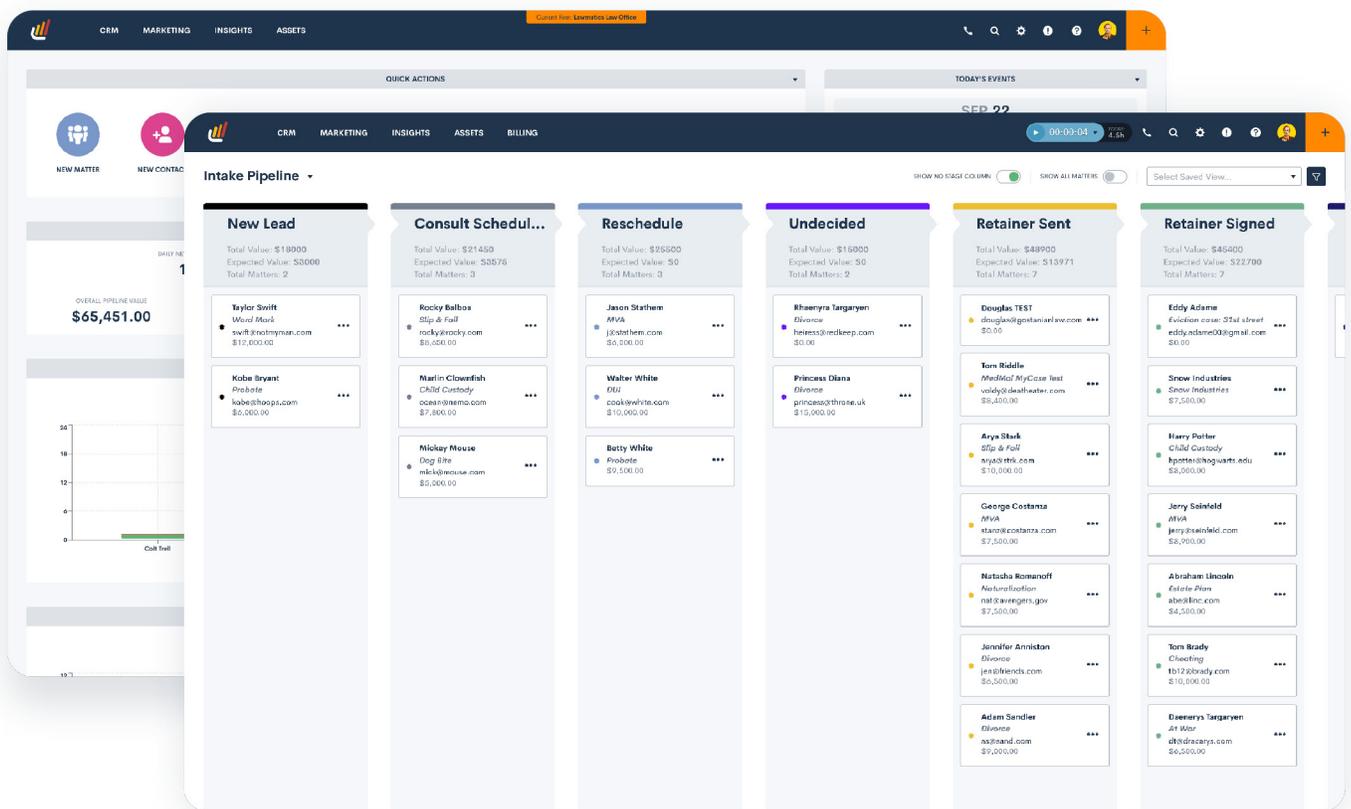
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The screenshot displays the Lawmatics CRM interface, specifically the 'Intake Pipeline' view. The pipeline is organized into six stages, each with a total value, expected value, and number of matters. The stages and their associated client cards are as follows:

- New Lead:** Total Value: \$18900, Expected Value: \$30000, Total Matters: 2.
  - Taylor Swift: Word Mark, swift@taylornan.com, \$15,000.00
  - Kobe Bryant: Probate, kobe@hoops.com, \$0,000.00
- Consult Schedule...:** Total Value: \$21450, Expected Value: \$3576, Total Matters: 3.
  - Rocky Bulbas: Sfp & Full, rocky@rocky.com, \$5,000.00
  - Marin Cloverfish: Child Custody, ocean@nemo.com, \$7,800.00
  - Mickey Mouse: Dep file, mickey@disney.com, \$5,000.00
- Reschedule:** Total Value: \$25500, Expected Value: \$0, Total Matters: 3.
  - Jason Statham: MVA, jstatham.com, \$5,000.00
  - Walter White: DUI, cook@wwhite.com, \$10,000.00
  - Betty White: Probate, \$0,000.00
- Undecided:** Total Value: \$10000, Expected Value: \$0, Total Matters: 2.
  - Khaenya Targaryen: Divorce, khaenya@reelkeep.com, \$0.00
  - Princess Diana: Divorce, princess@throse.uk, \$15,000.00
- Retainer Sent:** Total Value: \$48900, Expected Value: \$13971, Total Matters: 7.
  - Douglas TEST: dought@costantianlaw.com, \$0.00
  - Tom Riddle: Mediated My Case Test, volodya@deal-walter.com, \$8,400.00
  - Arya Stark: Sfp & Full, arya@rha.com, \$10,000.00
  - George Costanza: MVA, stars@costanza.com, \$7,500.00
  - Natasha Romanoff: Naturalization, nat@avengers.gov, \$7,500.00
  - Jennifer Aniston: Divorce, jennifer@friends.com, \$0,500.00
  - Adam Sandler: Divorce, ad@sand.com, \$0,000.00
- Retainer Signed:** Total Value: \$45600, Expected Value: \$22700, Total Matters: 7.
  - Eddy Adams: Eviction case: 3241 street, eddy.adams0@gmail.com, \$0.00
  - Snow Industries: Snow Industries, \$7,500.00
  - Harry Potter: Child Custody, hpotten@hogwarts.edu, \$3,000.00
  - Jerry Seinfeld: MVA, jerry@seinfeld.com, \$8,000.00
  - Abraham Lincoln: Estate Plan, abel@lin.com, \$4,500.00
  - Tom Brady: Cheating, tom12@brady.com, \$10,000.00
  - Daenerys Targaryen: 24 Hour, dh@daenerys.com, \$0,000.00



**"We've had very specific goals as far as cases, new staff, offices, and growth in revenue. We have almost hit our numbers exactly over the last three years and I attribute a lot of that to Lawmatics."**

Ryan McPhie  
Managing Attorney, Grand Canyon Law Group

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**JOHN C. SCOTT**  
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# Improve Client Experience and Retention with Nonfinancial Metrics

Attorneys practice law every day, but most clients do not. Oftentimes, clients might be coming to the office with negative emotions: anger about an accident, sadness about a divorce or fear about creating a will. If you add to that a chaotic experience, you're less likely to have a satisfied client — which means fewer referrals and repeat business. A client who knows what to expect — and gets it — happily pays their fee, refers others and calls you every time.

“Clients want to feel as though you're responding to their unique needs. Having a process does not mean delivering cookie-cutter services. A process can be structured enough to allow for efficiencies *and* flexible enough to accommodate individual needs.”

Client experience and retention are what we call “nonfinancial metrics” — crucial aspects of running a law practice that have an impact on your bottom line but are not directly related to dollars and cents.

Clients want to feel as though you're responding to their unique needs. Having a process does not mean delivering cookie-cutter services. A process can be structured enough to allow for efficiencies and flexible enough to accommodate individual needs.

Even though keeping clients happy might seem more like an art than a science, it's possible to put systems in place to track — and improve — these metrics.

Here's how we do it:

## 1. Outline the milestones that will occur over the lifecycle of the matter.

Before you can educate your client about what will occur, you need to look at what parts of your practice are process driven. In certain areas of the law — family law or estate planning — this might be straightforward. What is your cadence of meetings? What paperwork is produced and signed, and when? (For criminal cases or civil litigation, it might be less clear-cut but still worth looking into, if you can document any part of the process.)

Treat each milestone as a chance to educate the client. With regular communication, you can set and adjust expectations. Just make sure that your updates are transparent and jargon-free. When you explain your processes in an understandable manner, you build trust and communicate your value, making them more than happy to pay the bill.

## 2. Set processes to ensure milestones occur.

Once you've got the necessary steps, think about what needs to happen to get things done and who is responsible. This step is a time to start thinking about reviewing your methods of communication and which tools can be used at different stages.

Consider multiple points of entry, in addition to the traditional phone and email, including Slack, text and video calls, to accommodate their preferences and increase their access to you — within the boundaries of your set office hours. Leveraging other technology, such as an online portal, allows clients 24-hour access to their documents, without tying up office assistants and paralegals in endless email requests.

Take time to document these processes, even the most routine. You'll revise them as necessary, but that requires starting with a baseline.

## 3. Collect information

Steps one and two are about putting your best foot forward. Step three is about making sure you actually are on track. As part of each milestone, we recommend building in an opportunity to monitor how well you are adhering to your processes. This could include checking in internally with your staff, but also conducting formal or informal client satisfaction surveys.

I've seen this play out where a firm creates a list of questions for their clients to gauge client satisfaction. As soon as they get a negative answer, they bring it to the managing attorney who takes steps to address it directly. Then, they'd follow up the next week to see if things had improved.

## 4. Make course corrections as necessary

The big accomplishment comes when you take your feedback and use it to tweak your processes. Is every client getting hung up on the same issue? If so, maybe it's time to reconfigure the process, tackle the problem in a different way or get additional training for your staff.

As you repeat these steps, you'll ensure that you have the best processes in place, and that the client perceives value in your relationship.



## AN INVESTMENT IN PROCESS IS AN INVESTMENT IN GROWTH

Documenting and improving your client processes not only ensures you'll improve satisfaction and retention now; it also acts as an investment for onboarding new staff.

First, you're helping your team enhance their specific skills in relation to the processes, shortening the learning curve. Second, you're teaching them to develop and improve processes on their own, developing the firm's future leadership.

Creating these training processes allows you to scale with fewer growing pains. It's like building a franchise: Once you have a tried and tested manual that says what you do and how, as long as you stay open to improving, you can scale, hire more people and service more clients — without experiencing a drop in client satisfaction and retention.

### ABOUT THE AUTHOR

**John C. Scott** is a Partner in tax at Anders CPA + Advisors and leads the firm's legal industry efforts as a Virtual Chief Financial Officer. He offers dedicated resources, financial insight and critical thinking to address complex issues facing law firms, helping them be more efficient, competitive and profitable. Scott is an Accredited Estate Planner, Chartered Global Management Accountant and a CPA.

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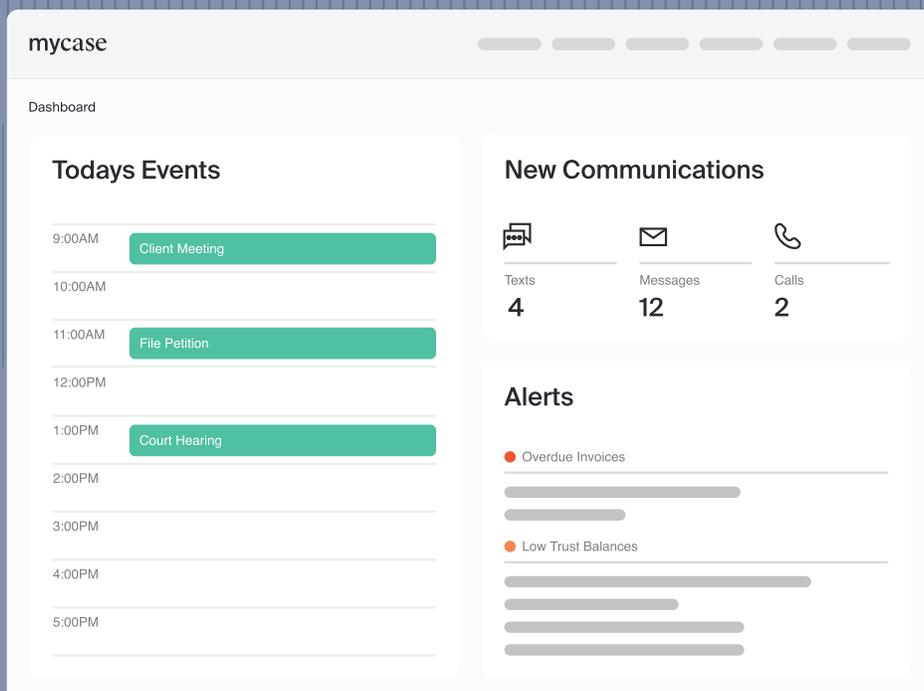
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SHRM-SCP**

*Manager, Office Operations  
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“If life has taught me anything at all, it is that you cannot always count on tomorrow to make things right with those who have crossed your path. So why should we wait for the holiday season each year to openly express love, joy, peace, and a desire to share our time with others? This should be our goal as ALA members and members of the legal profession all 12 months of the year.”

## Give the Gift of Inclusion This Holiday Season

**As the holiday season approaches, it is difficult to fully reflect on everything we have been through the last few years. Just as we thought that the pandemic was over and our lives were evolving into a “new normal,” along came the threat and reality of a serious recession, loss of jobs and the inability for some families to have the money to feed their children.**

And right in front of our eyes, human and civil rights in the United States appear to be taking a step back rather than moving forward. The recent striking down of race-based affirmative action programs in U.S. colleges, the Supreme Court of the United States’s overturning of *Roe v. Wade* and the four bills that were signed recently in Florida restricting LGBTQ+ rights, have opened our eyes to how important it is for us to continue to support each other this holiday season.

Here are a few things to remember:

- » Being diverse does not always mean you are different. Being diverse means you or someone you know may struggle in ways and for reasons that others may not understand or even recognize.
- » Teaching equity, unfortunately, will never mean that everyone will eventually be treated the same. There will always be some who have more and some who have less.
- » Inclusion should extend to everyone, and the process can begin by extending a helping hand or a listening ear to someone who might be alone or in need of a friend.

If life has taught me anything at all, it is that you cannot always count on tomorrow to make things right with those who have crossed your path. So why should we wait for the holiday season each year to openly express love, joy, peace and a desire to share our

time with others? This should be our goal as ALA members and members of the legal profession all 12 months of the year. Let's explore ways to heighten our awareness of others, starting today.

## LOOKING INWARD

Begin by taking a look at your firm. Do new employees feel welcome? Moving and changing jobs is extremely stressful. Newcomers might find themselves lost in a crowd of colleagues they don't know — they have lost their familiar work safety net. Please think twice about telling someone "No" when a new employee asks for an opportunity to volunteer. You may have just inherited a diamond from another firm who has tons of experience and is ready to shine twice as bright for their new firm. However, that shine can easily become cloudy if they are turned away from contributing due to ingrained practices that make your new employee jump through hoops before they can be considered to chair a committee or take on another leadership role.

Are your firm's activities planned for inclusion? Are they also accommodating for employees with disabilities? Is the title or theme of a program something that might offend a member from a different religion or culture? These are all very important points to take into consideration — even from the early planning stage.

Of course, those who create inclusivity deserve to be included themselves. Joining an ALA chapter or getting involved at the international level are great ways to immerse yourself in a

community of your legal management peers. Many chapters have mentoring programs and various opportunities to become a leader in ways that are different from your day-to-day work.

There are so many things going on in the world and beneath the surface of every person you meet. It is hard for people to express that pain to others if they feel shut out or believe that they will be treated differently for expressing a feeling or emotion. Everyone should be proud to share love, pain, laughter, tears, successes and failures with others. It has never been more important to begin building trust through transparency and celebrating people just the way they are.

### ABOUT THE AUTHOR

**DeAnna Vaughan, CLM, SPHR, SHRM-SCP**, is the Manager, Office Operations for the Houston office of White & Case, LLP. Since joining White & Case, Vaughan has overseen the build-out of over 66,000 square feet of office space and has managed the growth of the Houston office over the past five years, having seen the office grow from three partners to an office of more 130 employees. Vaughan joined ALA in 1998, served on the Orange County Chapter Board and is a Past President of the Houston Chapter. She is currently serving on ALA's Diversity, Equity, Inclusion and Accessibility (DEIA) Committee, while also serving on Houston's Business Partner Relations Committee and their Retreat Committee.

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## “Legal operations management roles will continue to evolve and become a more frequent inclusion within law firms and departments, in part due to emerging technology needs.”

A 2022 ACC survey found five in six chief legal officers expect to see greater collaboration between legal and other departments due to increased regulations and the need to optimize procedures.

“The legal operations role can create effective processes that enable the lawyers on the team to do more substantive work and, overall, improve the effectiveness of the legal department,” Sullivan says. “That is the other piece of why the role has become such an important and prominent discussion.”

### EVER-PROGRESSING RESPONSIBILITIES

After several years as an associate, Adam Becker was working in the admin and development side of law firms when a friend who was the deputy general counsel at a large public company suggested Becker apply for a newly created job within the organization’s legal department.

“He actually called me and said, ‘I don’t really know what this is. You’d be my peer; you’d be a senior leader. This is probably something you can do,’” Becker says. “I looked at the job description, and I had done a lot of it. So I applied for it.”

Initially, when he was hired in 2016, the role was largely talent management based. But Becker says it quickly grew to encompass the gamut of today’s legal operations work — handling outside counsel, IT tools, training and other elements.

At his first CLOC conference in 2017, he was amazed to see how many people were doing legal operations work. Becker, who now works as Director of Legal Operations at tech startup Cockroach Labs, estimates the total amount at least doubled in the next two years. By 2021, fueled by the increased need for coordination after remote work became more routine, he says the legal operations leadership position became even more prevalent.

“General counsel just don’t have the time to handle everything,” he says. “That’s really what our role is — to alleviate the general counsel from time-consuming things that can be managed by us. General counsel shouldn’t be on the phone negotiating rates with law firms, unless they want to be. And the general counsel isn’t going to make a shared platform for everybody to use in a consistent way.”

At a number of organizations, financial work has become a bigger portion of what legal op managers do.

When Jenita Gillespie, who’d previously worked as a law firm billing manager, was hired as a paralegal at Bon Secours Mercy Health in 2011, she quickly noticed a need for outside counsel electronic billing capabilities.

Gillespie’s role within the organization evolved to include that oversight, and after suggesting health care provider Bon Secours add her current role, she was appointed to be its first Director of Legal Operations in 2017.

“It was a brand-new role,” she says. “They welcomed it. It creates a lot of efficiencies across our ministry. Most of our business partners, they know if they can’t get to one of the attorneys, they can come to the director of legal operations so she can act as the liaison and help facilitate.”

Currently, Gillespie manages outside counsel rate negotiations, helps build workflows and contract repositories within the organization’s contract lifecycle management system, and performs document management and other tasks.

Her role has also expanded over the years to include managing the budget for purchased services and quarterly check-ins with the finance department.

“That helps us really look at the scope of everything and try to find cost savings,” Gillespie says. “Because outside counsel is hard to budget for. You can’t say, ‘This year you spent \$3 million, so you only need a budget of \$3 million next year.’ I really work hand-in-hand with the finance department so they can understand how legal operates when you’re engaging outside counsel in different types of matters.”

The legal operations manager-director role, Gillespie says, has grown tremendously in recent years — and could continue to become more universal.

“Historically, corporate legal departments were basically treated as corporate law firms,” she says. “Now they’re turning into more of a business unit inside that corporate structure, where they have a seat at the table. Legal is now involved with the strategic planning — you need that legal operations person who can get you data you need in a consistent manner.”

## SERVING AS DIGITAL GUIDES

Data and technology have been a focus for Rebecca Ross-Bown as Chief of Legal Operations for international law firm Reed Smith.

Ross-Bown transitioned to law firm business management, and eventually, legal operations. After reaching the senior associate level at a Big Law firm, she decided to leverage her economic consulting background, which had been her pre-law school career.

In the last few years, firm management members, she says, have increasingly utilized more extensive and sophisticated data — generally, the internal metrics that any business would use to try to run smoothly and be profitable, and other data that indicates how the law firm is delivering legal services to its clients.

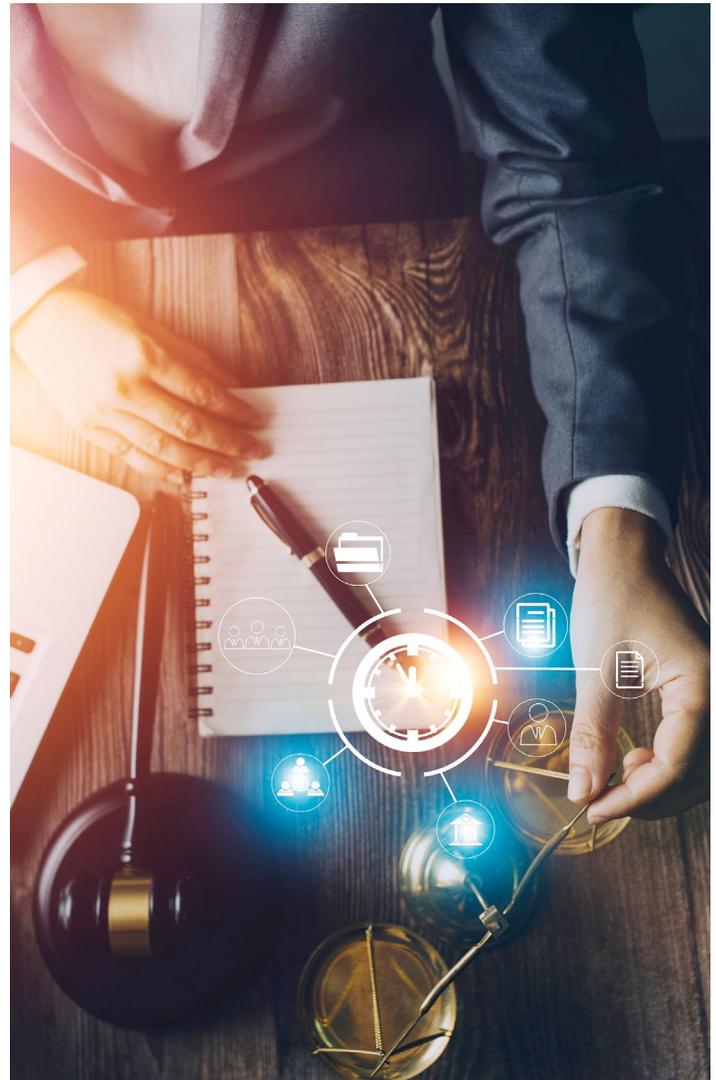
“That requires [us to] collect and heartily harvest our own data that’s client- and matter-centric,” Ross-Bown says. “We also then harness it to do better for our clients down the road. In both of those buckets of data, there’s just been an exponential growth of the use of data — the embrace of data. It’s now very much in the daily conversations inside firms like the one I work at. That’s a real change.”

In the last decade, in particular, firms have had an opportunity to think differently about pricing, scoping and project management, Ross-Bown says. That said, finding ways to trim expenses, optimize teams’ time or maximize technology’s effect while simultaneously maintaining legal service delivery quality can prove challenging.

To successfully make the required changes, firms and legal departments, according to Ross-Bown, need to have people on board who understand how legal work is performed, and the areas where process changes might be effective.

“Lawyers traditionally have not been trained on the business side of being a lawyer; they’re also not traditionally trained in process improvement and project management,” she says. “For a long time, people held those disciplines out as things you see in manufacturing or the medical industry. But we have to bring all of that in now to legal services — and there’s no reason not to, because it’s all aimed at delivering better services for our clients.”

While legal operations manager candidates might find having some industry experience helpful, Becker doesn’t believe a JD is needed to do the job.



“Understanding the culture of lawyers and legal timeframes is really helpful. The other hard skills, of course, are organization, project management [and] financial acumen is really important. Also, there is inherently some degree of negotiating with law firms, tech vendors. In terms of soft skills, curiosity is really important. You want to learn what your business does — how it makes money; how it operates. We’re always doing something new; you really want to be the type of person who enjoys learning.”

Both Sullivan and Ross-Bown anticipate legal operations management roles will continue to evolve and become a more frequent inclusion within law firms and departments, in part due to emerging technology needs.

“This role has nowhere to go but up because there just will be a continuing need for that refined data analysis,” Ross-Bown says. “You layer in additional technology, including the

elephant in the room — all of the AI technology that is upon us — that’s an incredibly rich area where we are seeing clients quickly adopt more AI-enabled technology so that they can run a better business. And [they are] looking to their law firms to do the same thing.”

Sullivan feels the position may ultimately be seen as a business partner to the chief executive officer — or a resource to advise the board.

“That continued expansion of not only their legal expertise, but their business acumen will continue to be a huge piece — having the predominant leadership and management skills to help the organization not just execute, but set business goals,” she says. “And the technology piece isn’t going anywhere. As we see that rapidly continuing to grow, the legal ops individual will have a lot of responsibility in how the legal department [or] law firm continues to respond to that in the legal profession.”



### Continue the Conversation about Legal Ops with *Legal Management Talk*

Legal operations shares many similarities with firm administration, and thinking with a legal ops mindset can help make your firm more efficient. We explored this in a recent episode of *Legal Management Talk*, where Tom Stephenson, Vice President of Community and Legal Ops at Legal.io, discussed the six key elements of legal ops and how using those principles allows your firm to streamline processes ranging from billing to client management to e-discovery. Never miss an episode! Subscribe wherever you get your podcasts or watch us on YouTube. Visit [alanet.org/podcasts](http://alanet.org/podcasts).

#### ABOUT THE AUTHOR

**Erin Brereton** is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

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**AMINA SERGAZINA**  
Freelance Writer

“  
People on a team are an investment, and if you’re investing in your team and you’re making sure that they have whole-body wellness, that is an asset to your organization.”

## What’s on Deck in 2024 for Legal

*Continued conversations on mental health, artificial intelligence and progressive recruitment will continue to be top of mind for the legal industry in the new year.*

**If we have learned anything in recent years, it’s that predicting trends can be a moot point.**

But as we close out 2023, there are three areas that seem likely to be top of mind in legal. From the pressing issues of mental health to the integration of artificial intelligence (AI) and to reshaping recruitment strategies, the legal profession is poised for change.

### THE MENTAL HEALTH CRISIS IN THE LEGAL PROFESSION

The legal profession, renowned for its rigorous demands and high-stress environments, has long grappled with a pervasive mental health crisis.

Marsha Brown, PhD, is a licensed psychologist with expertise in stress management and collaborates with organizations and business leaders to comprehend the detrimental effects of stress on company culture, performance and individuals. She uses the Deconstructing Stress method to empower high-stress professionals, conducting corporate training and workshops that enable employees to enhance their overall quality of life and performance.

“People on a team are an investment, and if you’re investing in your team and you’re making sure that they have whole-body wellness, that is an asset to your organization,” Brown says.

In a nationwide study published by the National Library of Medicine in 2016, it was revealed that 28% of lawyers experience depression, 19% report anxiety, 21% have alcohol-related problems, 11% face drug use issues, and lawyers contemplate suicide at a rate two to three times higher than the general population, shedding light on concerning aspects of lawyer well-being — and the toll this can take on those who work in that environment.

## “Struggling to hire talent will continue to be an issue into 2024. That’s because while law firms’ criteria have not changed, the criteria of the new generation of lawyers have.”

As Brown elucidates, legal professionals often find themselves juggling a multitude of tasks, including managing diverse personalities within law firms. The weight of these demands frequently leads to overwhelming stress and eventual burnout. To cope, many turn to unhealthy outlets, such as alcohol or recreational drugs, further exacerbating depression and anxiety. Brown observes the need for intervention at an early stage and notes that this mental health crisis begins in law school, where unyielding deadlines and relentless pressure set the stage for future struggles.

“For a lot of people, they find themselves super overwhelmed, and then they get to the point where they’re burned out,” Brown says.

While the statistics are unsettling, Brown believes there is hope on the horizon. Some law firms have begun implementing wellness programs that offer resources for mental health care, which have shown promising results. Moreover, encouraging staff to take mental health days and setting boundaries, as Brown emphasizes, are essential steps in fostering a supportive work environment. It’s vital for leadership to lead by example, respecting their team members’ off-hours and not expecting them to respond to emails outside of work.

Furthermore, Brown underscores the importance of the change in the legal industry and the somber future if no action is taken. She suggests that management have personal conversations with employees, provide mental health services and evenly spread the workload.

“Not having a focus on whole health or whole well-being is a recipe for depression, anxiety and drug abuse,” Brown says. “If nothing is done, there will continue to be significant increases in depression, anxiety, substance use and suicide among legal professionals.”

### FAST CHANGE AND FOCUS ON DIVERSITY IN RECRUITMENT

Struggling to hire talent will continue to be an issue into 2024. That’s because while law firms’ criteria have not changed, the criteria of the new generation of lawyers have, says Sharon Meit Abrahams, EdD, President of Legal Talent Advisors, LLC, and a member of the South Florida Chapter.



“A lot of law firms don’t know how to make those changes; they don’t know how to update their culture to fit the desires of the younger generation,” Abrahams says.

She explains that the younger generation does not feel as strong of a need to become partners and is more comfortable with good salaries instead of overworking and pushing for bonuses.

As more industries adopt remote or hybrid work schedules, many firms are reverting back to prepandemic policies for in-office hours. However, employees are expecting flexibility. Abrahams suggests firms look closely at their remote and hybrid policies to maximize success and help with recruitment.

In order to recruit not just good lawyers and legal support staff, but people who strive to make money for the firm, Abrahams advises hiring people who understand how law firms make money and ask tougher questions that focus on the business side.

As the industry works to improve diversity within firm leadership, it’s not just enough to attract diverse talent — firms need steps in place to implement evenly assigned work.

“If I was a firm that wanted to hire a really nice diverse group of people, then a work assignment system helps assure that everybody’s getting good work, challenging work and work that helps them grow and develop,” she says.

“Firms must invest in staying current with technology trends. Ignoring AI could lead to substantial shifts in the industry, putting firms at a disadvantage.”

## AI CONTINUES TO RISE IN THE LEGAL INDUSTRY

Artificial intelligence (AI) made its way regularly into the headlines for 2023 — for good and bad. That’s not likely to be different in 2024, as companies continue to refine the tech to make it more reliable.

Robert Plotkin, a Founding Partner of Blueshift and a software patent attorney, is an AI expert and uses it daily. He says that it not only enhances accuracy but also saves valuable time — a key point for firms.

Plotkin emphasizes that AI’s growing proficiency in document review and legal research is a significant trend. AI-powered tools, like large language models, offer natural language search results that streamline legal research. However, he cautions that the risk lies in the potential for AI to generate inaccurate or erroneous text, demanding human supervision to manage these risks effectively.

AI is reshaping the structure of law firms by empowering junior lawyers to produce high-quality legal advice and documents, reducing the need for extensive supervision from senior lawyers, Plotkin says.

“On the other hand, it can enable a senior lawyer to do work with less assistance from junior lawyers because the AI might be doing a lot of the detailed work, like research and writing that a junior lawyer might have done for them,” Plotkin says.

However, he notes that this enhanced efficiency could hurt the industry due to its accessibility to clients who can use AI tools for self-help, obtaining answers to legal questions, or even drafting documents independently.

As the legal industry navigates these technological changes, Plotkin suggests that firms must invest in staying current with technology trends. Ignoring AI could lead to substantial shifts in the industry, putting firms at a disadvantage.

“AI is absolutely unavoidable in the legal profession,” Plotkin says. “Legal clients are likely to start using AI tools themselves, which will put pressure on law firms to adopt AI responsibly to improve the quality and efficiency of their services.”

But AI’s impact is not limited to document review and legal research; it also plays a pivotal role in recruitment. It can analyze data to assess potential candidates, identify the best fit, and streamline the hiring process. This approach ensures that law firms hire the most suitable professionals and diversify their workforce effectively.

“Staying on top of the technology and remaining agile is key for law firms,” Plotkin says.

## LOOKING AHEAD

As we look toward 2024, it seems these trends are more than just passing conversations. Firms will continue to grapple with how to manage mental health, hire and recruit top professionals with more diverse backgrounds and discover new ways to work with AI to improve efficiency and workflow. Look for additional coverage on all three of these topics in *Legal Management* in the coming year.



### Listen to *Legal Management Talk* for More on These Three Industry Trends

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**Mental Health: Shifting the Conversation from Stigma to Support** with James Cornell



**Can AI Make Your Firm More Efficient?** With Hamid Kohan



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**Amina Sergazina** (they/she) is an immigrant from Kazakhstan who is passionate about justice. They believe in power of journalism and view it not just as a tool for awareness but also as one to change the world for the better. In 2018 they, along with their mother and little brother, immigrated to the United States in Chicago. Sergazina grew up on American movies and always dreamed of living in the U.S. They were granted a full ride scholarship to Columbia College Chicago and graduated in May of 2023 with a bachelor’s in journalism.



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PHILLIP M. PERRY

Freelance Business Writer

“Gen Zers are an incredibly unique workforce. Applying time-tested management techniques with the incoming generation will not achieve the results of the past.”

## Retooling Your Firm for Gen Z

*Understanding what motivates this incoming workforce will be key to attracting (and retaining them) at your firm.*

**Here come the Gen Zers. As the fastest-growing component of the nation’s labor pool, Gen Z (those born between 1997 and 2012) are poised to have a major impact on the legal profession.**

“Gen Zers will become an increasingly large cohort of attorneys at law firms,” says J.B. Pullias, a Senior Director at VOYlegal. “And that means management will have to understand the different way they look at their careers.”

Attracting the best new talent — and keeping it onboard over the long term — may require a retooling of the workplace in general and personnel practices in particular. “Gen Zers are an incredibly unique workforce,” says Zachary Ginder, PsyD, MSW, Executive Director at Pine Siskin Consulting. “Applying time-tested management techniques with the incoming generation will not achieve the results of the past.”

So what will work? Here are some ideas.

### WORK-LIFE BALANCE

The pandemic has had a profound effect on workplace attitudes. “Gen Zers’ experience with COVID means they have come from an environment that is different from any other generation’s,” says Pullias. “They have their own ideas about remote work, the practice of law and career fulfillment.”

That different attitude includes a commitment to work-life balance, meaningful labor and a diverse workplace, notes Pullias. “For Gen Z attorneys, a career is not just about money.

**“For Gen Z attorneys, a career is not just about money. They’re more interested in doing something that’s fulfilling and makes them feel passionate. They are also more socially aware and favor employers who are involved in the community.”**

They’re more interested in doing something that’s fulfilling and makes them feel passionate. They are also more socially aware and favor employers who are involved in the community.”

The carrots and sticks that used to work on older generations may not work on younger attorneys, says Pullias. One particular carrot that may be fading: the lure of partnership. “At one time, it was generally understood that young attorneys who put in the time ultimately had a good shot at making partner,” he says. “That made the difficulty of the early years of practice worth the effort.”

Times have changed. “Gen Zers are seeing the writing on the wall: It is far more difficult to make equity partner now,” says Pullias. “You could do everything right, play all the games, get in good with all the right people, do excellent work, sometimes even bring in business as an associate and still be overlooked. And there is only a limited number of spaces available.”

The lure of a top job in Big Law also seems to elude many Gen Zers. “Surveys show they are thinking more about nonlaw firm opportunities such as nontraditional legal paths, in-house roles, nonprofit work or JD preferred positions,” Pullias says. “This attitude shift is a big deal for law firms concerned about attracting a steady stream of young attorneys interested in the profession.”

## **JOB HOPPERS**

If many 20-somethings fail to see a favorable cost-benefit analysis for working toward partnership, law firms will need to reengineer their retention policies. Failure to do so can result in a steady talent leak — for the fact is that Gen Zers are likely to jump ship at the sight of greener grass.

“The stigma of job hopping is not as present for Gen Zers as previous generations,” says Ginder. “If the work is not interesting, or fails to check their motivation boxes, they are more likely to leave than stay and grind it out.”

Furthermore, Gen Zers have access to a wider selection of greener grasses — thanks to the internet. “We live in a society where there’s just so much more access to information and so many more outlets for people to anonymously air their grievances about employers,” says Pullias.

Prospective hires can get candid information on a law firm by reading posts from current and former staff members on sites like Fishbowl, a recent Glassdoor acquisition that has gained something of a following in the legal industry, noted Ginder. “Attorneys can freely talk about their firms and exchange information about work culture, and what particular offices are like, in an anonymous way.”

## **KEEPING TALENT**

No law firm wants to invest a lot of time in developing talent that ends up leaving quickly after starting. So, the question becomes, how do you keep Gen Zers committed? How do you keep them motivated?

The industry would do well to concentrate on these attractants:

### **1. Develop a healthy workplace.**

“Workplace culture is extremely important to Gen Zers,” says Pullias. “There’s an increasing refusal of younger attorneys to accept things that have typically been very prominent in the practice of law and swept under the rug. Toxic behavior has to be stamped out, even if it’s coming from highly profitable partners.”

### **2. Commit to diversity.**

“I sense that Gen Z attorneys are considerably more resistant to hypocrisy when they encounter it,” says Pullias. “For example, if a law firm very publicly claims to champion diversity and inclusion as a paramount objective, yet clearly ignores this commitment in practice, Gen Z takes note. They respect action, not words. The best way for a firm to strengthen its reputation with Gen Z in such areas is to live up to their promises and let the results speak for themselves.”

### **3. Establish gender equity.**

“An important part of workplace culture is the treatment of female attorneys,” says Pullias. “Women now outnumber men in law school. Law firms have to understand the unique issues and challenges that female attorneys face, including inflexibility for mothers, rampant female discrimination, and a lack of alternative career paths for women who don’t want to make partner.”

## 4. Promote work transparency.

“Gen Zers want clear understanding about what is expected of them,” says Pullias. “This is particularly important when it comes to whether remote work will have a negative effect on the attorney’s career or earning potential.”

## 5. Set predictable schedules.

“One of the most common reasons young attorneys want to leave their firms, or the profession altogether, is the unpredictability of their schedules, and having to be on call 24/7,” says Pullias. “They never know if they can make plans for the weekend because they might get an urgent need from a partner or client. That weighs on people after a while, especially those that don’t have a baked in mindset of doing whatever it takes to succeed. I see this affecting Gen Z far more than older generations.”

## CHANGE IS HAPPENING

The firm that sets a positive stage early will have a better chance of fostering an effective performance from Gen Zers.

“Whether senior leadership likes it or not, things are changing and will only change further. The law firm that wants to attract and retain Gen Z attorneys must understand they can’t just keep doing the same thing year after year and get the same results.”

### 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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“Everyone is getting on the digital bandwagon within the legal ecosystem, from clients to courts to expert witnesses. It’s time for law firms to learn to use that information more strategically to make better decisions — where they can make changes, boost productivity or optimize operations.”

## Why Law Firms Should Be Embracing Analytics

**Estimates indicate that 328.77 million terabytes of data of data are produced daily. However, law firms represent a segment that hasn’t fully embraced incorporating data into their practices.**

A Bloomberg Law report shows only one-quarter of attorneys reported that their organizations currently have data-focused staff. Unlike the rest of corporate America, leveraging data analytics for better business decision-making is still in its infancy. According to Bloomberg, firms, surprisingly, don’t believe there’s a need for data expertise. This not only explains their hesitancy, but also doesn’t make sense given how data-centric society has become.

Technology — especially data analytics — can help law firms weather new challenges, among them rising costs, maintaining profitability, a shortage of attorneys and the retention of existing staff.

It has been harder for law firms to avoid technology’s advancement. In fact, Gartner expects spending on legal technology to grow threefold by 2025. Additionally, the International Legal Technology Association (ILTA) is focusing efforts to bring data to the legal industry and help organizations integrate it into their practices.

With the economy still unpredictable, law firms will continue to reevaluate their needs. However, they should be open to incorporating data analytics to gain an advantage in growing and prospering in a changing marketplace.

### NO DATA-FOCUSED STAFF, NO PROBLEM

Law firms don’t need internal data-focused staff to obtain metrics to make informed, data-driven decisions. Partnering with a data analytics provider with legal experience can help firms improve visibility into the key performance metrics that matter, such as

performance (by staff, legal disciplines, partner firms, etc.); case levels; spend and budget; litigation expenses; flat-fee efficiency; and case duration.

Everyone is getting on the digital bandwagon within the legal ecosystem, from clients to courts to expert witnesses. It's time for law firms to learn to use that information more strategically to make better decisions — where they can make changes, boost productivity or optimize operations.

Numerous data analytics solution providers exist in the marketplace. However, the most innovative vendors with deep legal expertise can seamlessly pull together multiple data sources into one common view through configurable, custom-built dashboards. In many instances, dashboards can be integrated with existing legal tracking systems and/or gain access to aggregated data from other law firms worldwide to provide more valuable and insightful analytics on a variety of matters.

Law firms that incorporate operational data analytics can expect some of the following benefits:

- » Faster, more informed decisions enabled by on-demand access
- » Time savings through process automation
- » Creation of new value by freeing up team members to focus on higher priorities
- » Easy-to-understand and up-to-date metric summaries for stakeholders and leadership, accessible in real time
- » Consistent status reports on a schedule, populated with current data
- » Consolidation of data sources into one full view

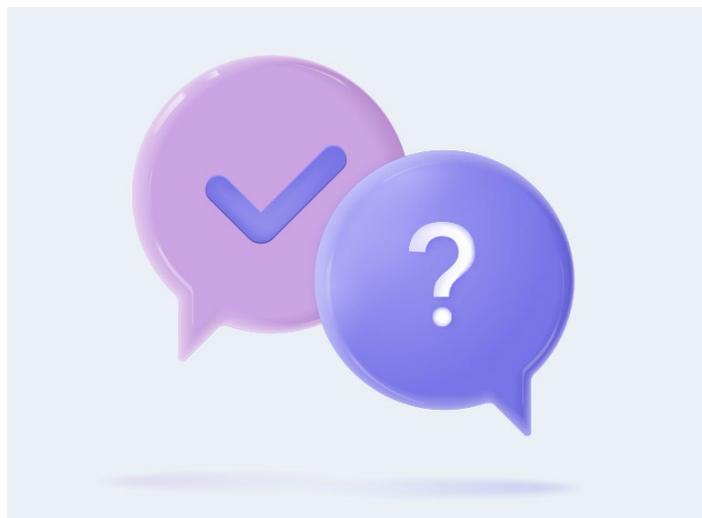
## DATA SECURITY IS A HIGH PRIORITY

More law firms have become targets for cybercriminals this past year considering the personal and confidential client information they possess. A recent report shows 27% of law firms experienced a security breach in 2022 alone, spanning more than 100 law firms in over 17 states.

Data security is paramount when engaging any data analytics provider since the legal industry is very regulated. Your cyber defenses must be rock solid not only in terms of maintaining compliance, but also protecting law firms' integrity and reputations.

## DATA-ANALYTICS QUESTIONS LAW FIRMS SHOULD ASK

Incorporating data analytics into business decision-making can seem daunting — particularly for firms that are not



analytically sophisticated or technologically savvy. However, working with the right data analytics partner can make the experience a success.

Here are the top questions law firm leaders should answer before starting their data analytics journey:

- » What decisions should we be making based on data and facts instead of relying on our “gut feel?”
- » If we had a clear, highly accurate and real-time view of our operations, how much more efficient could we be?
- » How much additional profit could we drive with more data-driven insights into our operations such as associate utilization and performance, dimensions of matters, attributes of the best cases, and forecasting of case duration and spend?
- » How could we take advantage of data and analytics technologies that have been successfully used by other law firms and/or pioneered in other industries?

It's impossible to look into a crystal ball to see what next year may bring. Inflation is still not under control, remote work continues and clients expect more services. Law firms cannot control any of these economic levers. However, firms can control how they plan and manage these marketplace impacts with accessible, real-time data that informs smarter business strategies and tactics.

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**KATE RATTRAY**  
Content Writer  
Clio

“Despite this increase in billable amounts among mid-sized law firms, the performance gap between them and smaller firms is shrinking.”

## 3 Legal Trends for Midsized Firms

There’s no denying that the COVID-19 pandemic significantly impacted the legal industry. Recent research has uncovered some ongoing challenges (and opportunities) for legal administrators in midsized firms (those with more than 20 employees).

Below, we recap three key findings from the 2023 Legal Trends for Mid-Sized Law Firms report.

### 1. The performance gap between midsized firms and smaller firms is shrinking.

The pandemic significantly impacted midsized law firms. However, they recovered in 2021 and even increased their casework beyond prepandemic levels. And, while the increase in casework was modest overall, midsized firms have seen tremendous growth in billable amounts. They are significantly outpacing smaller firms in this area.

While multiple factors could influence the growth in billable amounts, a convincing argument is that midsized firms are more inclined to raise their hourly rates than smaller firms. Midsized firms have consistently outpaced smaller firms in raising their hourly rates and even outpaced the consumer price index (CPI).

Despite this increase in billable amounts among midsized law firms, the performance gap between them and smaller firms is shrinking. For example, while midsized firms’ utilization rates (the number of hours put toward billable work as measured against an eight-hour workday) climbed slowly from 2019 to 2021, they dropped in 2022. Meanwhile, the utilization rates of smaller firms have remained relatively steady over time.

Similarly, midsized firms have historically lagged behind smaller firms’ realization rates (the amount of work billed to clients), which have remained relatively stable. Still, midsized firms are beginning to make gains that are narrowing this gap. Furthermore, midsized firms are currently outpacing smaller firms in collection rate (the amount of billed work that gets collected), but only by a narrow margin.

So, while midsized law firms are performing comparatively well, their competition is catching up. Legal management professionals should consider opportunities to optimize and streamline processes to improve these key performance indicators.

## 2. Clients want payment options that many midsized firms aren't providing.

A critical consideration for outpacing the competition is the client experience. However, many midsized law firms aren't providing the options their clients have come to expect.

For example, while 79% of clients say they would prefer to hire a lawyer who offers payment solutions that make payments more manageable, only 42% of lawyers in midsized firms recognize this demand (compared to 71% of lawyers in smaller firms). And, while both midsized and smaller firms primarily offer hourly rates and retainer options, smaller firms are more likely to also offer alternative payment models (such as flat fees) than midsized firms (27%, compared to 16% of midsized firms).

Offering alternative payment methods isn't just a boon for clients — it can also provide firms with stronger revenue streams. For instance, the 2022 Legal Trends Report identified that firms using cloud-based legal practice management (LPM) software were 11% more likely to report strong revenue streams than those going without, likely due to the options and opportunities they provide to streamline the payment process.

## 3. Midsized firms are falling behind on cloud technology adoption.

Despite the benefits of cloud-based LPM software when it comes to payment options, many midsized law firms need to catch up on technology adoption. Only 27% of midsized law firms reported using cloud-based LPM software compared to 73% of smaller firms surveyed. They are also less likely to use videoconferencing, electronic payments, e-signatures and cloud-based data storage.

The problem? This lack of technology adoption may contribute to both employee and client dissatisfaction. Among our data sets, we see that lawyers in midsized law firms using cloud-based LPM software report significantly higher performance on several metrics ranging from productivity to personal satisfaction. Furthermore, lawyers



using cloud-based LPMs are more likely to want to work and meet clients remotely — and, with more and more clients wanting to meet legal professionals virtually, the ability to offer remote meetings could play a vital role in a client's decision to hire a lawyer.

## CONCLUSIONS FOR MIDSIZED FIRMS

With one in four midsized firms already using cloud-based LPM software (with obvious benefits), moving to the cloud is no longer a “new frontier.”

However, navigating change in a larger organization will ultimately involve more planning and considerations than smaller firms. To that end, legal management professionals should consider change management best practices, including prioritizing technological upgrades, forming “technology committees” to help advocate for change in their organizations and connecting with their broader network for advice as they navigate the change management process.

### ABOUT THE AUTHOR

**Kate Rattray** is a former lawyer and Content Writer at Clio, an ALA VIP. She has previously written and edited for academic journals, legal publications and law firms and is passionate about supporting law firms with processes, content and more.

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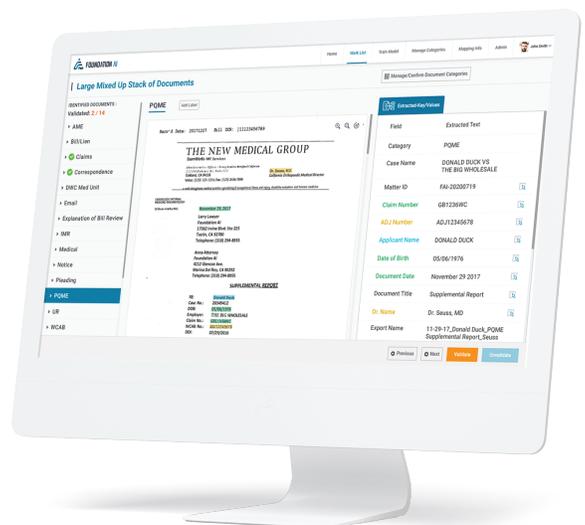
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**JON KROP, JD**  
Founder  
Flourish Legal Well-Being

“When you’re caught in a negative thought, ask yourself ‘Am I sure that’s true?’ to counteract our tendency to believe what our thoughts tell us.”

## 30-Second Stressbusters for Legal Professionals

**When it comes to stress, legal professionals face a double bind: We have more work-related stress than most, but we also have less free time to do something about it!**

Good news — managing stress doesn’t need to be time intensive! Sometimes, the most effective stress-relief techniques can take as little as 30 seconds.

### SELF-CARE IN SHORT MOMENTS

Don’t get me wrong: It’s helpful to invest some time in self-care when that’s an option. If you have 15 minutes to meditate, or an hour to get a massage, I definitely encourage that. But the reality of working in the law is that often, you won’t have that time.

In this article, we’ll explore three ways to calm your stress, anxiety, or overwhelm in 30 seconds or less. Applying bite-sized methods like this is actually a time-tested approach. In the Tibetan meditation tradition, there’s a famous teaching: “Short moments, many times.” Let’s draw inspiration from that and dive into these 30-second stressbusters.

### Cognitive Reframing: From Anxiety to Excitement

*Quick takeaway: Turn anxiety into fuel by reinterpreting it as excitement, a similar physiological state with more positive associations. This can be as simple as telling yourself, “I’m excited!”*

When we feel anxious, our instinct is often to try to calm down. That’s a tall order, since being anxious and being calm are basically opposites.

When you’re calm, your heart rate and breathing are slow, and your muscles are relaxed. When you’re anxious, your heart rate and breathing are elevated, your muscles are tense and you experience a rush of hormones like adrenaline and cortisol.

However, there's a state similar to anxiety: excitement. It also involves increased heart rate, accelerated breathing, and a release of adrenaline and cortisol.

Recognizing this similarity, Harvard Business School professor Alison Wood Brooks, PhD, has found in her research that by reframing anxiety as excitement, individuals can more effectively navigate stressful situations. Simply saying "I'm excited" during moments of anxiety can have profound effects, fostering a mindset that views challenges as opportunities rather than threats.

## Vagus Breathing: Calming the Body and Mind

*Quick takeaway: To calm the body and mind, 1) slow your breathing, and 2) breathe into your belly, instead of your chest.*

Vagus breathing is a method that stimulates a cranial nerve called the vagus nerve, which triggers a physiological relaxation response, calming the body and mind. Here's how you do it:

- » Slow your breathing to about six breaths per minute or slower. To get there, you can inhale for a count of five seconds and exhale for the same count.
- » Breathe down into your belly, rather than breathing from the chest. Chest breathing is associated with stress and tension, whereas belly breathing further stimulates the vagus nerve and relaxes you. You can place a hand on your stomach to check that it's expanding outward when you inhale.

Vagus breathing is fast-acting, discreet and as simple as it gets. A must-have for your stress-management toolkit.

## Questioning Thoughts: "Am I Sure That's True?"

*Quick takeaway: When you're caught in a negative thought, ask yourself "Am I sure that's true?" to counteract our tendency to believe what our thoughts tell us.*

Derived from cognitive behavioral therapy, this technique helps us avoid getting pulled into negative or anxious thoughts. Here's the idea: We have a tendency to take our thoughts as true, when actually they're often distorted, and sometimes they're just false.

To counter this tendency, when an anxious thought arises, just ask yourself, "Am I sure that's true?" This is often enough to loosen the grip of the distressing thought. If you need more help, you can ask one of these follow-up questions:



- » What evidence is there that this thought is true?
- » Are there any assumptions hidden in this thought?
- » Could there be another, equally plausible scenario?

Simple though this technique may be, it can shift your whole mindset in an instant.

## A WORD OF CAUTION

Sharing self-care methods is tricky, because it might seem to suggest that feeling stressed is *your* fault and that coping with it is your responsibility. I don't believe that. The problem is systemic, not merely individual. We're embedded in an industry and, for many of us, in organizations that are not set up to prioritize health and well-being.

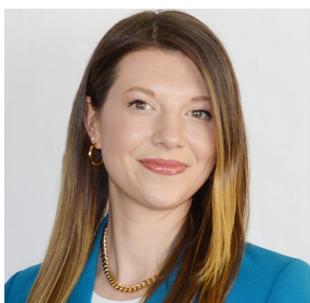
What I want to see is widespread change in the way legal organizations structure themselves, create their culture, and shape incentives around work and well-being. And, slowly, this change is starting to happen.

In the meantime, though, I want you armed with the tools to preserve your own well-being and to thrive in an often-challenging field. I hope these three methods — cognitive reframing, vagus breathing, and "Am I sure that's true?" — will help you the way they've helped me.

### ABOUT THE AUTHOR

**Jon Krop, JD**, has led well-being programs at Harvard, Stanford, Yale, the Pentagon, Fortune 100 companies, public defenders' offices, and more than 80 top law firms. He founded Mindfulness for Lawyers, then expanded it into Flourish Legal Well-Being, after graduating from Harvard Law School, clerking on the U.S. Court of Appeals for the Ninth Circuit, working as a litigator in Los Angeles and New York, and studying mindfulness since 2006 with teachers from around the world.

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MAGGIE MILLER

Principal  
Lotis Blue Consulting

“Cross-serving requires that someone in the practice has a deep understanding of the firm’s entire range of services and can identify possible synergies between different practices.”

## Protecting and Growing Revenue Streams: Client Retention Takes Vision and Execution

**Competition in the legal market is cutthroat, and today clients have more information at their fingertips than ever before — meaning they can easily find a reason (or no reason) to go elsewhere. Securing revenue by retaining clients has become one of the most important tasks in any firm.**

In our own internal research among the AmLaw Top 100, most firms experience somewhere between 10% and 30% of existing revenue churns every year. Some of this is inevitable. For example, sometimes a client will have one specific legal need, the firm solves it and the client goes away.

But in other cases, clients might go away because the firm hasn’t been proactive in nurturing that relationship, making it clear that the firm won’t be attentive to their future needs. This is likely because firms often don’t have a clear vision and execution approach to client retention. Here, we’d like to highlight the two most challenging components of a client retention strategy that firms need to define, and some approaches to getting more out of data and analytics.

### WHICH CLIENTS SHOULD YOU FOCUS ON?

When developing a client retention strategy, most firms first grapple with the difficult task of identifying which clients to prioritize in their client development efforts. This struggle often arises because partners will make trade-offs between nurturing existing key client accounts and pursuing new client acquisition.

Key client accounts are vital sources of revenue and stability for the firm, necessitating attentive care and tailored services to maintain their loyalty. However, given the focus on billable hours within most firms, partners and attorneys continue to focus on the

legal work of today, rather than potentially lucrative opportunities for the future. Most attorneys are working on multiple client cases at a time, especially at the partner level. Compounding the problem, many partner compensation plans still focus on origination of new clients as a major factor (or the only factor) for income distribution, disregarding client retention and expansion as an important metric. In any case, despite knowing retention is important, attorneys will dedicate little time, focus and attention to nurturing those all-important existing client relationships. Determining which clients to focus on is thus crucial to a firm's success.

More forward-looking client development specialists have started using data to approach this task in a more scalable way. However, the methodology to identify key client accounts is almost always based on the current state, rather than looking ahead to the future. Law firms often look at their top 50 or 100 clients by historical revenue over the past 12, 24 or 36 months. While this information can yield insights, it tells only part of the story. Looking purely at historical revenue won't tell you which clients are likely to grow in the future, which are likely to be the most profitable, which clients are satisfying and developmentally powerful for attorneys to work with, or which will create mutually beneficial strategic value in the long term by aligning with your firm's goals.

Though they may sound anecdotal, these are real metrics that can be captured using data that already exists in your finance, billing and HR systems. While many firms balk at what they assume will be a complex and time-consuming process, with the right data-driven approach and predictive analytics, many insights can be unlocked in a matter of weeks, not months using a few core data systems.

## ONCE YOU FIND THE RIGHT CLIENTS, HOW DO YOU DEVELOP THEM?

Once your firm has identified the clients that best suit your practice or industry groups, the team faces a new challenge: How to nurture these client accounts to expand into new service areas.

Given clients' intense (and justified) focus on legal expertise, law firms have naturally become siloed into specific practice areas. Each practice group often operates independently of all the others, focused exclusively on its specific area of expertise and client base. As a result, there may be limited communication and collaboration among practice groups, hindering the exchange of information about potential opportunities to cross-serve the same clients. Lawyers may prioritize hitting their individual practice's revenue targets,



which can discourage them from actively promoting services offered by other practice groups. Cross-serving requires that someone in the practice has a deep understanding of the firm's entire range of services and can identify possible synergies between different practices. Figuring out how to address a client's comprehensive needs can be a complex task on top of the many other things partners are asked to do daily.

Data can also play a role in a blueprint for a cross-serving strategy, giving attorneys a way to approach each of their targeted clients and tips on how to get the most value for their clients. It may look like an opportunity heatmap or a service stack strategy that uses predictive methods the system has learned from historical dealings with clients. Each client's unique needs might suggest a pathway to growth, whether that be through natural extensions of work within existing practices or possible cross-sells to other practices. Effective cross-serving also demands a cohesive internal culture that encourages teamwork and collaboration. Analysis of data can help unlock those internal barriers to suggest which other attorneys or resources within the firm can team up to increase the likelihood of successful client interactions and new revenue streams.

## A WAY FORWARD

Law firms need to prioritize client retention as a strategic imperative within their firms to unlock continued growth and drive revenue security. Attorneys actively working on matters can't go this alone without effective support, given their competing priorities. Enabling client development teams with the right data and analytics can help firms identify their most important clients and find new cross-serving opportunities while enabling growth and shoring up lasting relationships.

### ABOUT THE AUTHOR

**Maggie Miller**, a Principal at corporate advisory firm Lotis Blue Consulting, is a member of LBC's professional services practice and leads Orgaimi's client solutions team.

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**BIM DAVE**

Executive Vice President  
Helm360

“Addressing platform fatigue will also require a commitment from the legal tech industry to allow more connectivity between applications — and new solutions that integrate a firm’s entire IT ecosystem into a singular interface.”

## Why Law Firms Must Act Now to Address Platform Fatigue

**Accounting software. Practice management systems. Email. Zoom. Slack. Teams. As technology continues to evolve, the legal industry has seen significant advancements in software and platforms aimed at streamlining processes, enhancing collaboration and improving overall efficiency. From case management systems to virtual meeting tools, the number of software tools attorneys and staff use every day has mushroomed in the past several years.**

These applications, while individually valuable, often lack seamless integration and can become cumbersome to manage. Legal professionals find themselves constantly juggling between different applications, logging in and out, managing multiple sets of credentials, and dealing with varying user interfaces. This results in wasted time, reduced focus and, ultimately, diminished productivity.

With this rapid expansion of software applications and other tech systems, a new challenge has emerged: platform fatigue. This refers to the sense of overwhelm legal professionals might have when confronted with an excessive number of digital platforms, applications or services they need to interact with on a regular basis.

All these platforms might seem essential too — an attorney will say they cannot work without email, text messaging, Zoom or Slack. They might answer a client email, then hop on Zoom with their coworker, then Slack a paralegal about that same case, all within the span of 30 minutes. With dozens of platforms readily available for attorneys and staff to use, it can quickly become exhausting. People only have so much mental bandwidth to manage what has become a deluge of data provided by a seemingly endless number of tech solutions.

The vast amount of content available on different platforms can make it difficult to filter out relevant information. In turn, lawyers and staff spend too much time on various platforms that distract them from other important (and billable) activities, leaving them feeling unproductive. With each new platform introduced into the workflow, there

also comes an added learning curve. Training on the use of different platforms and ensuring compliance with data privacy and security protocols can divert valuable resources and add to the burden of implementation. The more platforms there are, the more potential vulnerabilities exist, leaving law firms susceptible to cyber threats and potential lawsuits arising from compromised client data.

Constant updates to applications may also make some users feel like they are struggling to play catch up to understand the changes. As a consequence, lawyers may become resistant to embracing new technologies or abandon them altogether, defeating the initial purpose of streamlining processes and increasing efficiency.

## FINDING TECH RESPITE

Despite these concerns, it's important to recognize the positive impact that legal platforms have had on the industry. Technology has undoubtedly simplified case management, streamlined research and improved collaboration, saving law firm employees valuable time. The goal should not be to abandon these innovations but rather to find a balance that ensures maximum benefits while minimizing the drawbacks.

One approach to mitigate platform fatigue is to consolidate as much as possible. Law firms and legal departments should assess their current suite of platforms and identify redundancies. Consolidating similar functions into a unified platform not only reduces the number of applications but also simplifies the user experience for legal professionals. An all-in-one solution that encompasses case management, document sharing, communication and billing can significantly improve efficiency and reduce the need for multiple logins.

Chatbots and other artificial intelligence (AI)-driven solutions are now specifically being designed to support the legal industry with platform fatigue in mind. These platforms provide a central

interface for lawyers and staff to interact with a variety of law firm systems through one point of contact, such as a messaging app, while also utilizing programs such as ChatGPT to assist with research and interpreting information.

No matter what platforms firms choose, integrating selected solutions with other essential tools — such as e-discovery services and legal research databases — can create a cohesive ecosystem that addresses a wide range of legal tasks. Investing in robust encryption, multifactor authentication and secure cloud storage solutions can also safeguard sensitive information and instill confidence in clients regarding their data protection.

Another crucial aspect of managing platform fatigue is fostering a culture of training and adaptability within the firm. With access to continuous learning opportunities, lawyers and support staff can remain up to date on platform developments and best practices. Regular training sessions and access to online resources can help bridge knowledge gaps and reduce resistance to change.

Addressing platform fatigue will also require a commitment from the legal tech industry to allow more connectivity between applications — and new solutions that integrate a firm's entire IT ecosystem into a singular interface. By working to mitigate platform fatigue, both law firms and vendors can create a streamlined, secure and efficient practice workflow that better serves both clients and legal professionals.

### ABOUT THE AUTHOR

**Bim Dave** is the Executive Vice President of Helm360. With 15+ years in the legal tech industry, Dave's keen understanding of how law firms and lawyers use technology has propelled Helm360 to the industry's forefront.

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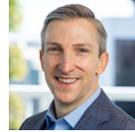
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# Anniversaries, Awards and Appointments

## Members on the Move »



**April L. Campbell, JD**, Past President of ALA and a member of the Puget Sound Chapter, is now Office Administrator at Seyfarth Shaw LLP in Seattle, Washington.



**James L. Cornell, III**, Past President of ALA and a member of the Capital Chapter, is now Director of Office Administration at Shook Hardy & Bacon LLP in Irvine, California.



**Deidre Jackson**, an Independent member, is now Firm Administrator at Hobbs Straus Dean & Walker, LLP, in Washington, D.C.



**Kim M. Novak**, a member of the Central Florida Chapter, is now Firm Administrator at Winderweede Haines Ward & Woodman, PA, in Winter Park, Florida.



**Shelby M. Nusrala, CLM, PHR**, a member of the Greater Kansas City Chapter, is now Regional Office Administrator at Spencer Fane LLP in Kansas City, Missouri.



**Geoffrey M. Williams, CLM, MBA, MDiv**, 2023–2024 ALA President and a member of the Mobile Chapter, is now Chief Operating Officer at Stone Pigman Walther Wittmann LLC in New Orleans, Louisiana.



## Sending Our Condolences

ALA is saddened by the passing last month of **Nancy Huffman**, who was a member of the Indiana Chapter. Nancy worked at the firm of Hall Render Killian Heath and Lyman for 35 years. She also loved reading and was an avid camper, according to her obituary. Her family requests donations be made to the Appendix Cancer Research Foundation. We send our condolences to Nancy's family, friends and colleagues.

## Discover Your Online Community

ALA's Online Community offers a unique way to stay connected to fellow members through user-friendly social media interfaces that offer special features:



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# What's Happening at Headquarters



## Time to Renew Your Love of ALA

With the holiday season approaching, it's best to check renewing your ALA membership off your to-do list! You can count on ALA and your fellow members to remain constant and accessible. We're here to keep you connected to your colleagues and provide professional development options that fit today's multiple work access profiles.

**Renew by January 1** and you'll **receive one complimentary webinar of your choice!** Renewing members will receive email instructions on how to redeem this special reward.

Visit [alanet.org/membership/member-center](http://alanet.org/membership/member-center) to learn more about how to renew and the benefits ALA membership provides.

## Looking for an Edge in the Talent Competitions? ALA Can Help.

As firms struggle with hiring and retaining staff, you need all the information you can gather to remain competitive. ALA's 2023 Compensation and Benefits Survey can help.

Our annual comprehensive report is filled with data from nearly 1,000 law firms across the country featuring over 400 pages of information. It's an essential tool to see how your firm stacks up in relation to compensation and benefits. Data is further broken down by region, state and metro area, making it even easier to compare your firm against competitors.

Firms with 100 or more attorneys are encouraged to purchase the bundle that includes the 2023 Large Firm Key Staff Compensation Survey Report, which contains data for director-level and C-suite positions in large law firms. Purchasers of the surveys consider them a valuable tool in determining compensation for new and existing positions in their firms. Visit [alanet.org/compsurvey](http://alanet.org/compsurvey) to order both reports and download the Executive Summary.



## Start Making Your Plans for Annual Conference 2024

Registration is now open for ALA's 2024 Annual Conference & Expo in Aurora, Colorado! Don't miss the chance to hear from engaging speakers on all the latest legal trends, meet exhibitors that have the business solutions your firm needs, and network with ALA colleagues new and old. Visit [alaannualconf.org](http://alaannualconf.org) to check out the agenda at a glance and then start making your travel plans to join us on **May 19–22**. See you there!

## ALA Celebrates National Native American Heritage Month

November is National Native American Heritage Month, when we celebrate the contributions Native Americans have made to the history and culture of the United States. In 1990, President George H. W. Bush was the first to declare the occasion, and it has continued every year since. The U.S. Department of the Interior designated this year's theme to be Celebrating Tribal Sovereignty and Identity, recognizing that any decisions about tribes must be made with their participation and consent.

Visit [alanet.org/membership/month-by-month-diversity-spotlight](https://alanet.org/membership/month-by-month-diversity-spotlight) to learn more about how you can commemorate the month, along with graphics and hashtags your firm can use on social media. ALA celebrates our Native American members and the important work they do in the legal industry!



## Receive Member Discounts from National Purchasing Partners

ALA has partnered with National Purchasing Partners (NPP) to offer member discounts for business solutions ranging from software to travel to internet services. For example, you can save up to 35% and get free shipping on HP tech products. Plus, save up to 25% on select hotels with Priceline travel deals. Go to [alanet.org/member-discounts](https://alanet.org/member-discounts) to learn more about NPP's offerings and register your firm.

A large promotional graphic for the ALA's 2024 Annual Conference & Expo. The background is a photograph of a city skyline with mountains in the distance. The graphic is divided into sections by geometric shapes. On the left, there is a vertical strip with a colorful geometric pattern. The main text "Registration Now Open!" is in large white letters on an orange background. Below this, the text "discover the difference" is in a stylized font. The ALA logo is present. The main event title "ALA's 2024 Annual Conference & Expo" is in large purple letters. Below it, the dates "MAY 19-22" and location "Gaylord Rockies Resort & Convention Center Aurora, Colorado" are listed. At the bottom, there is a QR code and the text "Scan or visit alaannualconf.org for more information."/>

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