

# LEGAL MANAGEMENT

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## Fetching the Latest in Tech and Cybersecurity Best Practices

Our annual special tech issue.





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“  
We have to become comfortable working in a world of gray — thinking on our feet and adapting to the needs of the moment.”

## The CLM Journey — It's Just as Important as the Destination

**It's human nature to be hesitant about taking an exam — anxious and preoccupied about whether we will pass. In reflecting on my own study journeys and sitting for the Certified Legal Manager (CLM)<sup>®</sup> exam, I completely understand and relate to why so many members struggle with these feelings.**

I decided to sit for the CLM exam in 2006 after learning about the program in this very magazine. I read about the benefits to both law firms and individuals who obtain the designation and knew right away it would serve me well.

Most of us spend a good part of our days fielding a wide variety of questions from lawyers and support staff. But isn't it interesting how, even though most of us are in defined roles, we are expected to know everything about everything? Quite frankly, the majority of what we do is not confined to the black-and-white box of a job description. We have to become comfortable working in a world of gray — thinking on our feet and adapting to the needs of the moment. That's how we discover the importance of widening and improving our skill set, seeking more education in all areas of the legal profession. By continually building our skills and increasing our knowledge in law firm management, it enables us able to appropriately and efficiently handle the variety of questions we receive, from technology and insurance to accounting, human resources and business management.

And that's exactly what the CLM is based on: the knowledge of what a principal administrator of a 30- to 50-attorney firm would need to know to be able to offer advice in the many knowledge areas relevant to legal administration.

The drive to improve our skills and seek continuing education to become more proficient in our jobs has motivated many of our members to seek certification. While the credential is a big goal, the "journey" is what helps to improve our competency. Many members have shared their journey with the Certification Committee: It often begins by navigating the

vast set of reference materials listed in the CLM examination application packet that apply to the job of a legal administrator. Then they assess the areas where they are most comfortable and those where additional preparation would be required.

While everyone's journey will differ with respect to preparation, the key for most is to focus on your weak areas, reviewing reference materials, seeking outside resources and reading materials, and in some cases, joining a CLM study group.

Our diverse backgrounds and different strengths and weaknesses in the core areas of knowledge make study groups a great way to assist in the learning process — and sometimes it can be a great deal of fun! Many have found that the study groups and/or a combination of different preparation techniques, with regular repetition, have definitely improved their skills and their confidence.

ALA headquarters also has started a trivia event that melds quizzing your knowledge with fun — and prizes! (See the end of this article to learn about that.)

Exam preparation is a personal endeavor, and everyone has their own comfort zone and learning preferences for how to do it. Take the road that best works for you to become more confident about the material in each of the core areas.

We are not expected to be “experts” in each area but rather “conversant” in each area of knowledge. And while knowledge is important, applying the knowledge is essential — understanding how to apply what you have learned is the key ingredient to testing whether you have truly absorbed the material during your journey.

Remember, your journey to sitting for the certification exam is just as important as taking the exam. Whether you pass or

not, you have certainly improved your knowledge and skills that you can bring back to your law firm and put into practice. In the event you do not pass the exam, please don't give up! Your exam results will indicate the areas you need to improve. Go back and begin the journey again, because it will be the best investment you will ever make in yourself!

Now, let *your* journey begin!



## IT'S TRIVIA TIME

There's still time to join other CLM exam preppers (and those curious about the exam) at our next trivia event. Join us **October 19 at 3 p.m. Central** for a fun, 90-minute event with questions pulled from the *Study Guide for the CLM Exam*. Best of all, you'll play for prizes! Each member of the winning team will receive a \$25 gift card. The \$29 registration fee will give you entrance to the event, place you on a team and make you eligible to compete for a prize. However, if you're registered for the November 16 CLM exam, you get to participate for free!

And keep watch for the January issue of *Legal Management*. We'll explore other journeys members have taken in earning their CLM certification.



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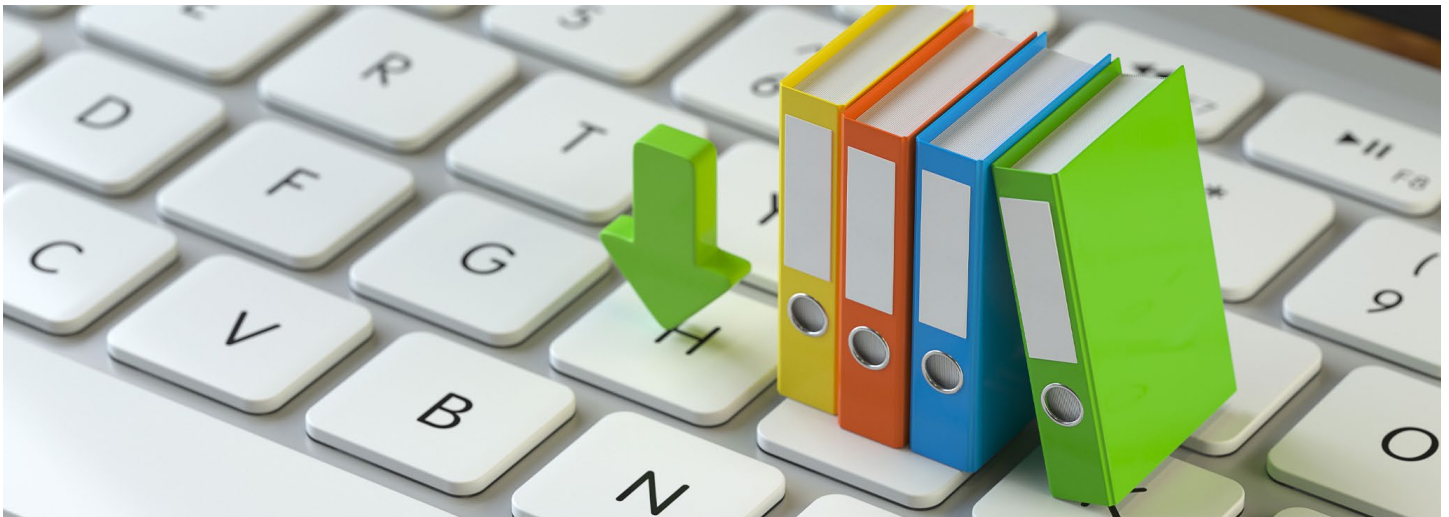


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“The records retrieval process is often overlooked as an area for increasing efficiency because legal professionals can be in the habit of ‘go with what you know’ instead of seeking out experts who may be able to offer improvements.”

## 7 Factors Legal Professionals Should Consider When Choosing Records Retrieval Support

**Records retrieval is a complex process in which law firms request, retrieve, organize and deliver personal records that are required for litigation.**

The largest portion of records requests is for medical, radiology and billing records that insurance carriers and their law firms need to support their cases. Other records, such as claim files, pharmacy records, police reports, employment information and incident reports, come into play as well, depending on the nature of the case. It’s an incredibly complicated process, and most law firms do not attempt to go at it alone. Instead, they partner with an outside records expert.

Because litigation today moves fast, legal professionals are constantly seeking ways to improve every stage of the process to generate efficiency and improve cost-effectiveness without sacrificing quality. In the early stages, the records retrieval process is often overlooked as an area for increasing efficiency because legal professionals can be in the habit of “go with what you know” instead of seeking out experts who may be able to offer improvements. But that can be a mistake when it comes to efficiency for this important step.

If your legal organization is ready to look for outside expert help, you should ensure your vendor of choice is following these best practices:

- 1. Your expert should process your request in a timely manner once your order has been received.** Timing can make or break your case — and the clock starts ticking as soon as records are requested. Nothing outside of 48 hours should be acceptable. The issuing of the request with accurate deposition of written questions (DWQs) is crucial to the admissibility of the records once they are received.

**2. Your expert should conduct research prior to issuing the requests.** This helps eliminate requests that will not produce records and circumvents most cancellation fees. How is this accomplished? Maintaining an extensive and accurate database of facilities and providers can save time and money. Many medical professionals use third-party providers, such as Healthmark or ChartSwap, to manage their patient records. Having this information upfront allows records companies to issue the request to the correct custodian the first time.

**3. Your expert should consistently follow up with custodians and communicate with the client.** It sometimes can take four or five follow-up attempts with the custodian before receiving the records. Your expert should have the experience and persistence to navigate the bureaucracy to speak to a live person and not rely on multiple messages and faxes that routinely do not get a response. Importantly, a thorough understanding of the applicable custodial fee guidelines is key to managing costs for clients. Success is measured not by how many messages or faxes are sent but by how many custodians have confirmed to send the records.

**4. Your expert should be able to give you the records in your client's preferred format and have checked them for accuracy against stringent quality standards.** Whether it's paper, searchable PDFs via an online repository or CDs — quality control once the record is received for production is vital. When your expert validates the associated legal documents for completeness and accuracy and ensures the legibility of the documents received, you and your client save time and money. One area that has become an issue with billing records is questions regarding detailed billing and payment information. It's imperative that the record retrieval provider checks the responses for accuracy against the records.

**5. Billing should be simple and streamlined without an excessive number of add-on line items.** Does the cost of the record fall within the cost constraints of your case? Are you notified about large custodial fees and voluminous records in advance of billing? These simple courtesies allow you to make informed decisions about your case.

**6. The turnaround time from when you first request records until you have them in hand in your preferred format should be 23 days or less.** The "difficult" records to acquire can often be the key to obtaining the proper settlement in a matter. Dedicating personnel to problem records that have incomplete DWQs, incorrect billing information or are missing the required certifications can avoid delays in getting the records to the client.



**7. Your outside expert should place a strong emphasis on cross-training employees.** This will enable you to shift personnel to different duties as needed to avoid backlogs and delays. Having an experienced team working on your requests is vital to the speed in receiving and processing your requests.

Most importantly, thorough, accurate and timely communication with your records retrieval expert is vital. Your expert should be proactively communicating with you on a consistent basis. Because litigation moves fast, quick turnaround times are a necessity. A company that has adapted its processes and procedures to ensure efficiency, accuracy and cost-effectiveness without sacrificing quality is an important part of a law firm's process and will help you save time and money on every case.

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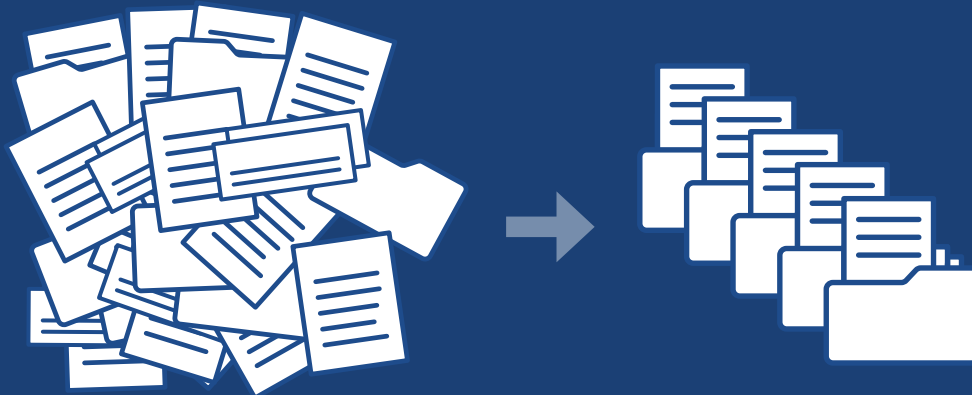
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**LIEL LEVY AND NATALIE FRAGKOULI**  
Founders  
Nanato Media

“  
Legal organizations  
need to better position  
themselves to serve this  
growing population,  
which has a reported  
high-brand loyalty rate.”

## 5 Tips for Connecting to the Hispanic Community

**The 2020 Census confirmed what many expected: The Hispanic population in the United States is booming, increasing 23%\* since the 2010 Census. In fact, as of 2020, people identifying as Hispanic or Latino accounted for a whopping 19% of the population. Given the rapid growth, how much of a minority will they be in the next decade?**

Businesses are likely to realign their strategic plans with this growing population and start prioritizing the Hispanic market, and legal organizations should not fall behind — for several reasons. Most important among them is that understanding diverse populations and how to reach them is the right thing to do. Additionally, Hispanics are the youngest population in the United States with a median age of 30 years.

With several years of experience marketing legal services to the Hispanic population, we'll outline how legal organizations and their staff can effectively market their services to this growing population as well as build a long-standing relationship with them. However, as attorneys look to connect with this Hispanic demographic, some principles need to be addressed.

### 1. FIRST, IT GOES BEYOND INCLUSIVITY

We can't deny that inclusivity has been front and center in the past decade, perhaps even more so since 2020, when a predominantly white America could no longer ignore racial disparities. With the Giant Five (Amazon, Google, Facebook, Apple and Microsoft) spearheading diversity and inclusion efforts, it's hard for law firms not to follow suit. However, winning over the Hispanic market goes beyond inclusivity — aside from being the right thing to do, it's also smart strategy.

*\*The U.S. Census Bureau made improvements to the Hispanic origin and race questions between 2010 and 2020 that may have affected the figures.*

Between 2015 and 2019, the Hispanic population grew by an average of 1.9% per year. In the last decade, they accounted for 52% of the U.S. population growth. In a country with four major racial groups, Hispanics account for more than half the growth. That's worth attention.

This growth is not only in headcount. Annual spending by Hispanic households in the United States is at a record high — just shy of the trillion-dollar mark. And with Claritas reporting that this group is expected to drive 62% of the country's population growth through 2025, it appears that this spending could reach new heights.

Legal organizations need to better position themselves to serve this growing population, which has a reported high-brand loyalty rate. Even as they focus on winning them over, legal practitioners have to also understand another important point ...

## 2. INCLUSIVITY DOES MATTER

The Hispanic market is filled with great potential, given that Hispanic people tend to trust one another's referrals and exercise a high level of brand loyalty. However, they are one of the toughest clients to close. This is mostly due to their inclination toward connecting with other members of the Hispanic community or, at least, companies in which they are well represented.

To stand a better chance at winning their trust and loyalty, legal organizations must consider opening their doors to more Hispanic staff and lawyers. A majority of Latinos consider a connection to their heritage an essential part of their identity. Besides, 95% believe it's important for future generations to continue to speak Spanish and connect with people they share a similar cultural heritage with.

Hiring Spanish-speaking lawyers and staff can help you build that necessary connection with this group. But there is more.

## 3. TITLES ARE EVERYTHING

Hispanics should not be seen as a monolithic group, despite some levels of cohesion within the population. If there is one area they don't seem to completely agree on, it's nomenclature.

Historically, they are generally addressed as "Latinos" and, in cases where a message is specifically targeted to women, "Latinas." However, as the population has gotten younger and LGBTQ visibility has increased, gender inclusivity has become a growing concern. Therefore, some have become sensitive to titles that retain the strict masculine/feminine formula.



That's why many prefer the more gender-neutral "Latinx." Simply addressing the group with this uniform title would be a simple fix for this, but a significant amount of Hispanic people also think "Latinx" disregards their original identity and deep-rooted heritage. The article "Latino/a vs. Latinx vs. Latine: Which Word Best Solves Spanish's Gender Problem?" — published by *Latina* in 2017 — asserts that "they are putting a distinctively American viewpoint into [their] language [and identity] without reverence for it."

Still others prefer to be identified by their family's place of origin: Puerto Rican, Mexican American, Cuban American, etc. This recognizes the cultural differences evident within the Hispanic community.

Therefore, for legal organizations looking to strategically align their business with this growing population, appropriately addressing your audience in your marketing campaign is another bridge to cross. Thankfully, there is a way to navigate this often confusing situation.

## 4. CONNECTING WITH THE RIGHT HISPANIC SUBGROUP

Again, Hispanics may share some similarities within the group, but they can be segmented into several subgroups with varying views and levels of connection with their Latin origin. Understanding each subgroup will help you address and market your services to them appropriately.

For instance, the Latinoamericano subgroup has very strong ties to their Latin origin. They speak Spanish almost exclusively with little to no English. They are more likely to frown upon the gender-neutral Latinx title and may prefer to build intimate connections and trust with only Spanish-speaking attorneys. Ambicultural Latinos, on the other hand, are well immersed in American pop culture. However, their bond to their Latin origin is not broken. This subgroup is more likely to welcome the gender-neutral term.

However, between the Latinoamericano and Ambicultural Latinos, there are three other subgroups that every attorney and law firm with an interest in the Hispanic market must understand and connect with. But we uncovered a key finding in our book, *Beyond Se Habla Español: How Lawyers Win the Hispanic Market*: all five subgroups are internet-savvy to a significant level. Therefore ...

## 5. DIGITAL MARKETING IS VITAL

This is true for most younger populations these days, and the Hispanic population is no different. With about 98% of Hispanic people in the United States using smartphones, they are the group with the highest smartphone penetration and social media use, followed by non-Hispanic whites (95%). Because much of the population has been born in the internet age, they are better acclimatized to the digital space.

On average, more than half of U.S. Hispanics (52%) spend at least one hour on social media each day. And a significant proportion (27%) say they visit social media to discover new products or services. This makes the digital space a viable

medium for legal practitioners to connect with this growing population and position themselves to forge strong business relationships.


## PLANNING AHEAD

The Hispanic population will play a pivotal role in shaping the next decade, legal services included. There's no one-size-fits-all approach to reaching this (or any) population, but by keeping some of these points top of mind can help you build a trusted relationship with this growing community.

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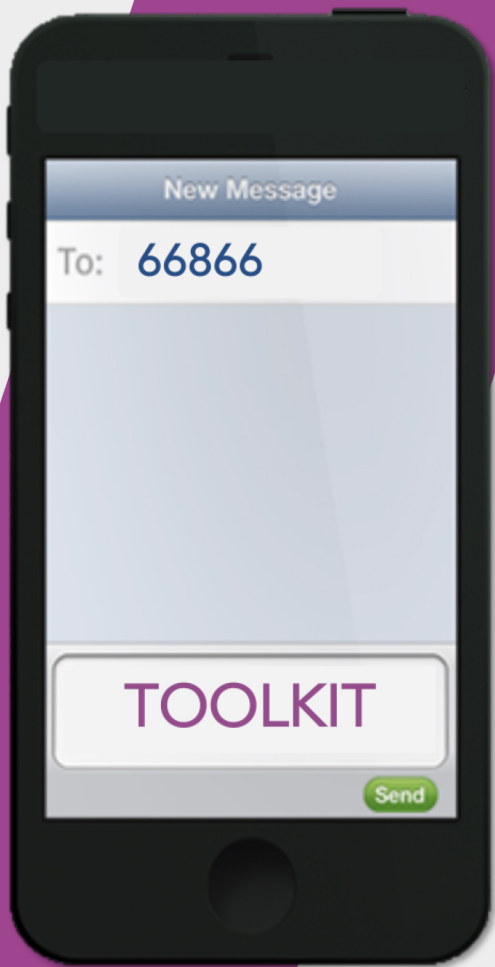
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**MARK BREWER**  
Freelance Writer

## Want to Move Tech Forward? Make It Part of Your Strategic Planning

*A strategic approach to implementing new technology offers the best chance of success.*

**Today's legal clients increasingly expect more production from their law firms at a lower, predictable fee. This expectation is driving significant transformation in the legal profession to leverage technology for more efficiency and higher quality.**

*Wolters Kluwer's 2021 Future Ready Lawyer survey found that tech-savvy firms reported greater increased profitability from 2019 to 2020 compared to firms that are transitioning or trailing in adopting technology. The survey also discovered that tech-forward firms plan to increase their investment in new technology. This indicates a growing gap between law offices that are leveraging technology for efficiency and those that are lagging in adopting technology.*

Clearly, many legal professionals see technology as a way to improve efficiency, deliver better service and increase profitability. "Efficiency opens the opportunity to deliver better service at a lower cost," says John Remsen Jr., President of The Remsen Group, a leading consulting firm for small and midsize law offices. "Technology makes us more efficient, more productive and makes us better practitioners of law."

Robert A. Young, Managing Partner at English, Lucas, Priest & Owsley, LLP (ELPOLaw), agrees: "It's all about creating efficiencies, doing away with redundancies and getting the technology you need and what your clients expect you to have." Young — a former Chair of the ABA Law Practice Division, which produces the ABA TECHSHOW — also notes that "Unless you're strategically planning, I think you're committing malpractice, and a large part of strategic planning needs to include technology."

“Everyone says that lawyers don't like change. Yet change happens anyway. In the 1990s, law firms struggled with the idea of using email or having a website. Today, nobody questions it.”

And it's the strategy part of technology where legal organizations seem to fall short. Experts see a lot of investment in law office technology, but not much strategy to back it up.

"Investments should be deliberate, not just a partner saying, 'I need this software for a project,' and you buy the software, use it once and never use it again. It's very ad hoc," Remsen says. "With a long-term strategic approach, you can make sure you're buying the right systems."

## RELYING ON LEGACY PROCESSES AND THINKING

That strategic approach to adopting new technology is more than just finding the right tools and software. There is also the people component and managing the staff through change, which can be the biggest hurdle.

"The successful adoption of technology is really a people issue — having people who are willing to try new things, are OK with change and are adaptable," says Neil Kardos, a Partner at Harrity & Harrity. "That may sound easy, but it's not. Having an adaptable workforce is usually the bigger challenge over finding the right tools."

Lawyers, in particular, like autonomy, and many have preferred ways of working that aren't shared with the rest of the office. It's a chronic problem Remsen often sees. "I hear a lot from paralegals who work with five different lawyers, each of whom handles a file a little differently or has a unique set of forms. It's very inefficient," he says. "If you have firm-wide policies, processes and procedures, someone needs to make sure employees are following the firm's way, not their individual way."

Inconsistent processes can lead to the inconsistent use of technology. For example, there might be some lawyers using a personal customer relationship management (CRM) program instead of the one the firm has invested in for staff.

"So you invest in a fancy six-figures CRM system but don't insist that everyone use it. Why?" asks Remsen. He says technology needs to support the firm culture and the ways firm employees collaborate with one another and with clients, which means you need to require everyone to use standard tools and technology.

Certain practice groups in Young's firm — like estate planning and personal injury — have their own software. "But for billing, document management or any other process that's used across the firm, we want the same system," he says.

Another challenge to efficiency is long-established traditions of the legal profession, such as the billable hour. "Many attorneys

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**"The ripest tasks for automation are tedious, repetitive ones, such as copying and pasting the same legal text over and over. In general, if the task doesn't require human judgment, it should be a candidate for automation."**

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want it to be long, complicated and protracted. Clients, on the other hand, want things done better, faster, cheaper," says Remsen.

That's why fixed fees are attractive to clients. "Operating in a world where you have a task to perform and you're paid a fixed fee for performing that task requires efficiency. Our whole approach to technology is thinking about how we can be more efficient," Kardos says.

Remsen cites Harrity & Harrity as an example of fixed-fees success. "Harrity can run circles around most firms when it comes to patent prosecution work because they've embraced the technology, processes and systems to do things far more efficiently. And their clients love it."

## TAKE STOCK OF YOUR TECHNOLOGY ENVIRONMENT

The first step in getting ahead of changing and advancing technology — and to go from reactive to proactive — is to take stock of what you have today. "If you haven't had an IT audit within the last two years, that's a good place to start to see what you have, what's being used and what's not being used — and to see if you have the right systems, policies and procedures in place," says Remsen. He suggests engaging a competent IT organization that's not selling you a product. They need to know how law firms work and how they process information, process paper and manage files.

## CENTRALIZE TECHNOLOGY DECISIONS

While you're arranging for an IT audit, you can start the second step, which is to set up a committee or task force dedicated to evaluating and approving processes and technology purchases while keeping the needs of clients and practice areas in mind.

This is a critical step, says Young. "I think the key is listening to your team to determine what they want."

To create a process for listening, he established a technology committee comprising firm attorneys, administrators, accountants, paralegals, legal secretaries and the firm's chief

operating officer — representatives of the firm’s entire user base, not just lawyers. “Our case managers are the ones that have contact with the client every day,” Young says. “So we need to know what kind of technology they need in order to enhance their ability to communicate with clients. Listening to more people has worked out really well.

Reach out to those on staff who know a lot about technology and follow its trends. “I appreciate technology, but I know there are others in the office that have much more knowledge than I do when it comes to technology,” Young says. “It’s just a matter of putting those like people on that committee.”

Kardos adds: “You have to include the people who will be using the technology and who know what the problems and pain points are.”

One outcome of ELPOlaw’s proactive approach to technology is its preparedness for the pandemic. The firm didn’t miss a beat when employees started working from home because the committee made the decision to move to the cloud. “That was the best decision that we have made in years. Our people immediately had the ability to work from anywhere,” Young says.

“The task force has done wonders for us in terms of staying ahead of the game,” Young continues, “because a lot of our people know what they want and what they need.” And thanks to the technology committee, when the firm implements something new, it’s used consistently across the firm, he says.

## IDENTIFY OPPORTUNITIES FOR EFFICIENCY

With a technology committee in place, the next step is to identify opportunities for efficiency. “To get a focus on efficiency, examine your whole process and determine what steps can be eliminated. Do this before adopting any technology,” suggests Kardos.

For example, Harrity’s client interviews were recorded and transcribed by an attorney, which isn’t something an attorney needs to do. Kardos says they delegated that task to the paralegals. Later, the firm tried eliminating the transcriptions altogether and found that nobody needed them.

“If there’s a question, the lawyer can always refer to the recording,” he says. “Once you’ve really refined things, you can consider automating what’s left. Don’t spend time and effort automating something that doesn’t need to be done.”

The ripest tasks for automation are tedious, repetitive ones, such as copying and pasting the same legal text over and over. In general, if the task doesn’t require human judgment, it should be a candidate for automation.

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## “For legal organizations to stay relevant with clients and improve profits, they need the flexibility to adopt similar processes and technologies used by their clients.”

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“We have tools that are focused on speeding up the process and making us more efficient. We also have tools that are focused on improving quality, like automated error checking and proofreading types of tools,” Kardos says. “Efficiency, quality and accuracy are the main things that are behind our drive to adopt technology.”

Look for low-hanging fruit — use cases that deliver a quick win and real value. This will help you validate your technology strategy and demonstrate the value of a committee to review and approve new tools.

Kardos says that once you have a better idea of what you need and why you need it, it’s easier to find solutions and test them. Generally, you want to pilot any new technology to see if it really works and, most importantly, fits into your workflow. If you have a positive experience with a new solution, implement it with training and make it mandatory for all who have a use for it.

Everyone says that lawyers don’t like change. Yet change happens anyway. In the 1990s, law firms struggled with the idea of using email or having a website. Today, nobody questions it.

For legal organizations to stay relevant with clients and improve profits, they need the flexibility to adopt similar processes and technologies used by their clients. That can include the intelligent use of the cloud, process automation or anything else that your clients have implemented to stay ahead of the competition and improve profits.

“Change is the new normal,” Young says. “The key to adapting is to stay ahead of change to the extent you can. It’s imperative in driving your firm forward.”

### ABOUT THE AUTHOR

**Mark Brewer** is a freelance writer who helps decision makers understand technology, trends and ideas to make them more effective in their work.

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**2021  
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## AI's Unknown Role in Legal Operations

*Legal industry members are using the technology in ways you — and some of their employees — might never guess.*

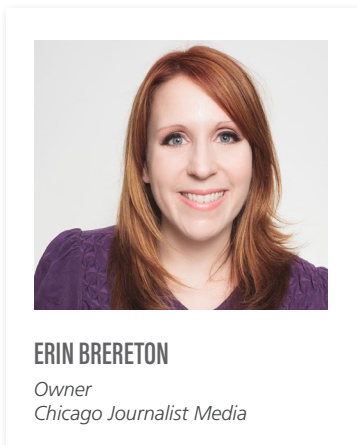
**Artificial intelligence use isn't a brand-new concept in the legal industry — just over a third (34%) of law firms and departments said they were using AI or machine learning tools in 2020, according to a Bloomberg survey, an 11% increase from 2019.**

The technology has actually been in use for years. It came on the scene early on for the e-discovery process and now assists in a growing number of legal functions, including due diligence contract review, says Daniel W. Linna Jr., Senior Lecturer and Director of Law and Technology Initiatives at the Northwestern Pritzker School of Law and McCormick School of Engineering.

"Tools developed for e-discovery are also useful in that context, and we're seeing more use of machine learning tools to assist for drafting things in the litigation process, as well," Linna says. "There's really been an explosion in thinking about how to use the technology."

AI and machine learning algorithms, according to Bloomberg's survey, are most often used in legal research technology, followed by e-discovery, document review, drafting, contract management and litigation analysis.

While AI use may seem ubiquitous within firms, at the same time, it can be fairly imperceptible. Employees might know it's involved in some of the solutions they use for tasks like drafting a complaint — but may not actually be aware AI also comes into play in other functions.



**ERIN BRERETON**

Owner  
Chicago Journalist Media

“While some law firms and legal departments are interested in and experimenting with AI solutions, a number still manually read contracts.”

“We’re all familiar with spam filters on our email, and we probably use email software that [gives] auto suggestions. We don’t stop to think, ‘That’s AI behind that,’” Linna says. “For a document management system, when you’re trying to find knowledge in a repository, there’s almost certainly AI that is supplementing the process in different ways — but it’s not necessarily apparent. It’s just helping to solve the problems and feeding information forward.”

## PARING DOWN AND PARSING INFORMATION

While some law firms and legal departments are interested in and experimenting with AI solutions, a number still manually read contracts, says Jerry Ting, a Harvard Law School graduate and Founder and Chief Executive Officer (CEO) of the contract management platform Evisort, which leverages proprietary AI that understands meaning and context in legal language.

“It just feels really inefficient,” Ting says. “If you use AI and more advanced forms of technology, you can augment — not automate — a good portion of that so lawyers can do what they’re actually meant to do: be an advocate, counselor and strategic adviser.”

Providers such as Reveal, which offers an e-discovery solution that encompasses processing, early case assessment, AI and review functionality capabilities, enable firms to minimize the amount of data they’re looking at — which can be crucial given the amount, says Wendell Jisa, Reveal’s Chief Executive Officer (CEO) and Founder.

“The way data has grown, you’re now talking about terabytes — millions of documents,” Jisa says. “It’s just not humanly impossible to be able to sift through those amounts of data without AI. Automation is coming much faster than people think. It’s happening today; we’re [working] with multiple law firms to build out different types of features and functions they could use internally.”

Global law firm Pillsbury Winthrop Shaw Pittman LLP began using Reveal’s complete platform in 2020 and hopes to eventually use it to build conceptual models that can be leveraged to flag certain types of content from one case to the next. They began exploring ways it could enhance OpenText’s Axcelerate platform, which the firm had already been using for several years, according to Partner David Stanton.

“We had some creative ideas about how to use AI in various ways,” Stanton says. “We have these big collections of tens of thousands of documents that need to be reviewed. That emerged into a license for OpenText’s Magellan platform, an industrial-grade AI tool meant for big data analytics. It wasn’t an out-of-the-box solution designed for use in the legal

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“The shift to AI-powered processes likely won’t replace the need for humans to perform legal work. The technology may, however, enhance roles and possibly create new ones within the industry to help position firms to take advantage of AI’s full capabilities.”

---

market; we were confident we could build applications to run inside of Magellan.”

The firm, which around 2019 rebuilt some of those applications in an Amazon Web Services environment, has created functionality that can establish a model from the documents you’ve marked as relevant to the case and will suggest certain documents do — or don’t — fall within that model.

“It’s not just limited to search terms; it will know the difference between a latex and baseball glove by context,” Stanton says. “It allows us to more quickly identify what’s likely to be relevant [and] look at those documents first without having to look at all the documents. That ability to put legal minds on relevant documents and stop having clients spend so much money on having to weed out junk is where the most significant savings in the workflows I oversee are realized.”

Stanton also feels that a tool the firm has been developing to review emails and other documents during discovery shows promise. It would provide attorneys with a clearer sense of when conversations took place and help put the narrative of a case together.

“The idea is to deconstruct those communications and put them in a chronological sequence,” he says. “Once you’ve identified a set of key documents, you can basically have the system digest that information down to a cogent timeline of substantive communications that went back and forth. The amount of deduplication and clutter you can pull out of those data sets is enormous. Routinely, 70% to 80% of the content drops out. It makes the real facts of the case more accessible much earlier.”

## CONFORMING TO CLIENT GUIDELINES

Counterparties in transactional matters involving Chapman and Cutler LLP’s clients frequently pay the legal fees — so the firm’s clients aren’t always as interested in efficiency as other

“The firm has created functionality that can establish a model from the documents you’ve marked as relevant to the case and will suggest certain documents do — or don’t — fall within that model.”

clients might be, according to Eric Wood, the firm’s Practice Innovations and Technology Partner.

The six-office firm, though, saw AI could offer opportunities internally to decrease time, costs and possibly the way matters are priced. So it began using Kira, a contract analysis tool, several years ago, Wood says. The solution came pretrained for several legal concepts and documents but could also learn a firm’s models using specific examples of legal text.

The firm’s AI use has allowed it to create a new business line that involves attorneys and contract specialists, college graduates who are part of the firm’s law school program, reviewing high-volume contracts like nondisclosure agreements (NDAs) for clients — work, Wood says, that Chapman typically wouldn’t do.

Instead of accessing Kira directly, reviewers use software the firm built to send documents to the tool for AI analysis.

A document may, for instance, be run against a review checklist of items a client wants in every contract, such as indemnification provisions being removed. Kira is trained to identify text associated with those items; the reviewer can click on any issues indicated in the checklist to navigate to that text in Microsoft Word.

“We found people didn’t want to go to another platform,” Wood says. “They’re used to the environment they work in every day, which is largely Outlook and Word. We basically built our own solution that uses Kira as background technology. It saves a lot of time for the reviewers, having to see whether or not something exists in a contract or meets the clients’ standard. Review times sped up by 25% to 30% once we connected Kira to Word.”

## ENRICHING LEGAL SERVICES

The shift to AI-powered processes likely won’t replace the need for humans to perform legal work. The technology may, however, enhance roles and possibly create new ones within the industry to help position firms to take advantage of AI’s full capabilities.

“More and more, firms are hiring data scientists,” Linna says. “Not just to be able to forecast how much a matter is going to



cost. It’s also if I’ve been sued and the lawyer says our strategy is to file a motion to dismiss, we can use data to understand what’s our likelihood of success. We need data scientists who can analyze that data and develop those models and predictions, and lawyers to explain it to clients in a way the data can help inform [their] decisions.”

The greater emphasis clients have placed on both cost and value since the Great Recession may remain a focus for many. By tapping into AI-fueled technology, law firms could potentially be able to reduce the time involved in tasks.

Some are also taking additional AI-related steps, Ting says, such as forming analytics groups to show clients they’re using a smart approach to completing work — not just throwing bodies at billable hours.

“It’s become a buyers’ market,” Ting says. “There are so many competitors to law firms. When they’re bidding for a piece of work, they try to bring automation as a piece of their pitch and say, ‘Hey, we’re not the cheapest option, but we try to reduce 40% of lower junior associate work and not bill that to you by using high automation workflow tools,’ and pass the savings on to the client. Ones that don’t do that will be left behind.”

### ABOUT THE AUTHOR

**Erin Breton** 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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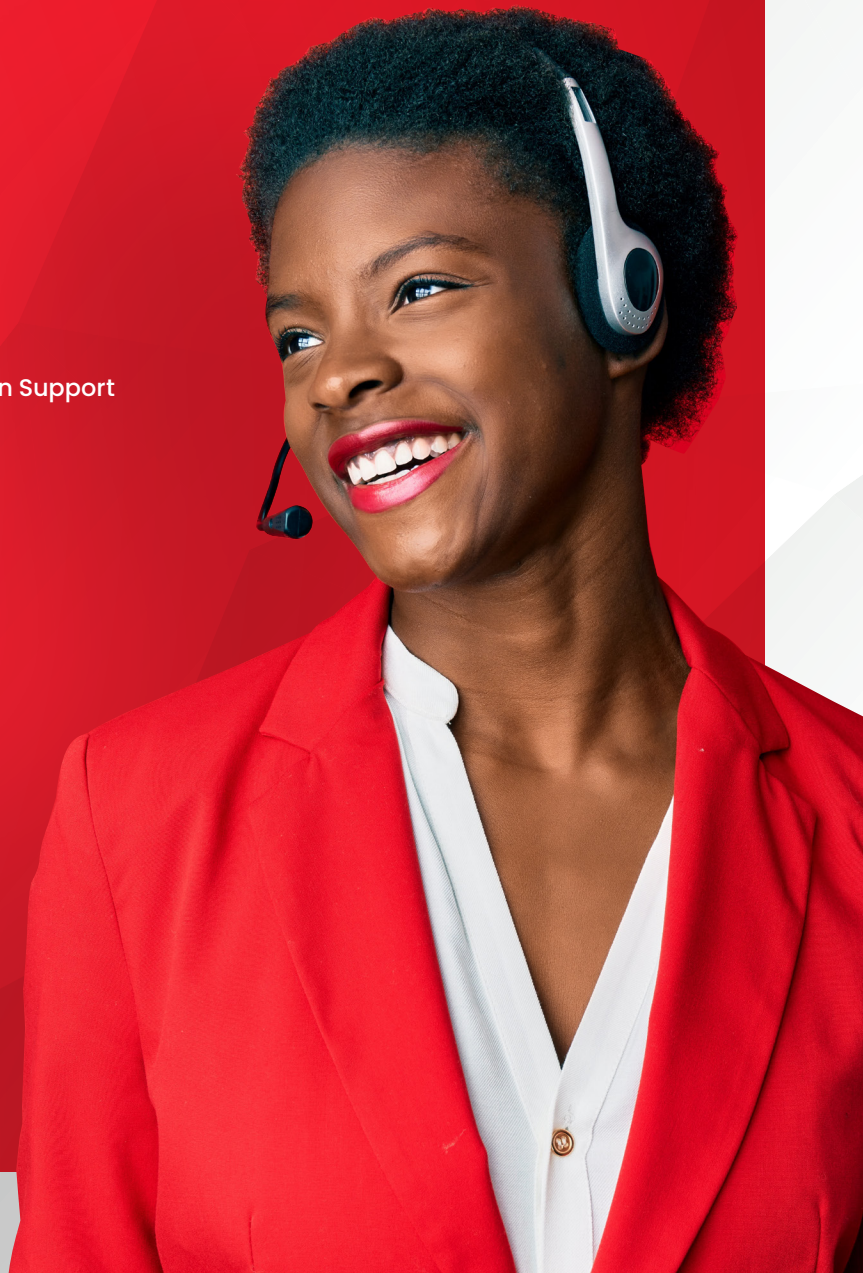
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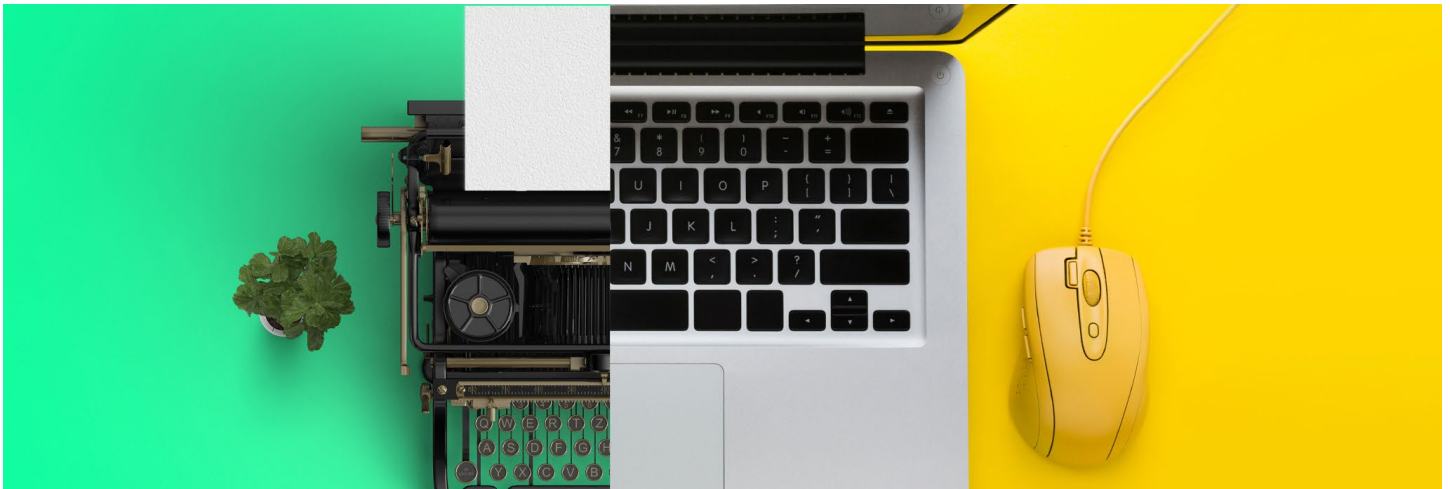
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**CHRISTINA FLOYD AND  
KAREN LEASTMAN**

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## IT Strategy for a New Era of Business

**The past year accelerated digital transformation efforts out of necessity, but as we move into a future where COVID-19 is more manageable, legal organizations must think more strategically about their IT investments to achieve long-term success.**

Legal executives can leverage flexible financing and IT refresh solutions to get the tech they need today and drive innovation tomorrow.

### IT REFRESH SOLUTIONS

A lease-based technology refresh program allows firms to avoid obsolescence and reduce ongoing IT maintenance. The lease can cover both hardware (like computers, servers and networking equipment) and software (like licensing, implementation and consulting fees), and allows the firm to rent the equipment for less than today's cash price while gaining predictability through fixed monthly payments.

With this strategy, firms can refresh their technology every three to five years and prevent user downtime. This is often the smarter choice than purchasing expensive IT assets that will become obsolete within a few years.

### TRENDING LEGAL INVESTMENTS

New technology allows firms to stay competitive and drive innovation within the legal market. Current tech investments are focused on software and equipment that allows employees to work where they need to.

“  
With this strategy,  
firms can refresh their  
technology every three to  
five years and prevent user  
downtime.”

Trending technologies for law firms include:

- ▶ **Laptop refreshes:** With the migration to a hybrid work model, investments in laptops continue to surge within the legal industry.
- ▶ **Global office upgrades:** As firms expand to new regions, they are setting up global data centers, disaster recovery sites and other infrastructure equipment.
- ▶ **Data security solutions:** Firms are increasing measures and systems designed to securely protect and safeguard information and therefore investing in improved data storage equipment.

As we enter a new era of business, IT strategy will be the ultimate differentiator for law firms to succeed. Strategic investments in technology, coupled with the right financial approach, can set top performers apart in today's competitive landscape and prove even more valuable in the years to come.

**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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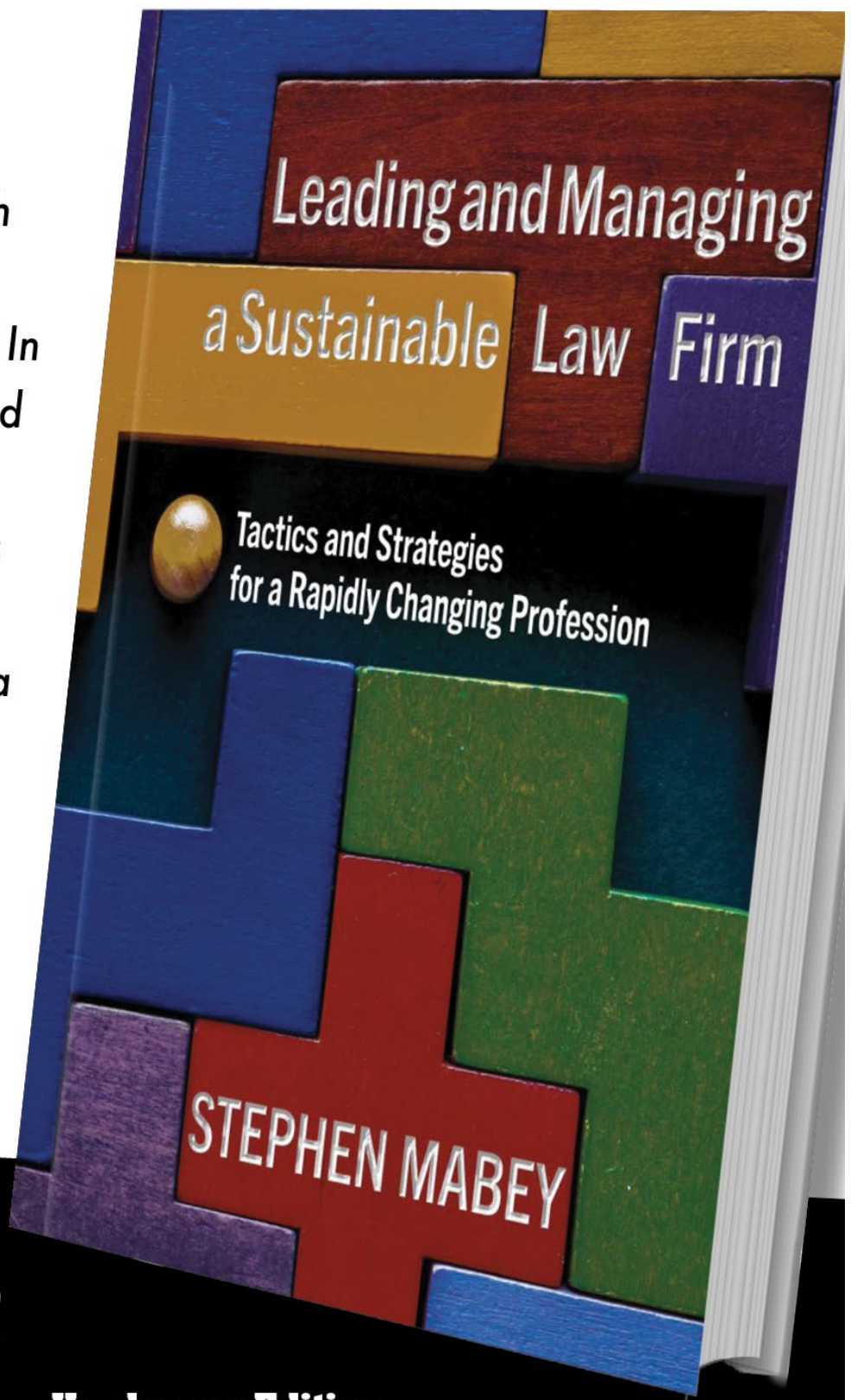
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*Excerpt from the  
Foreword by  
Thomas Clay Altman  
Weil Inc. (retired)*

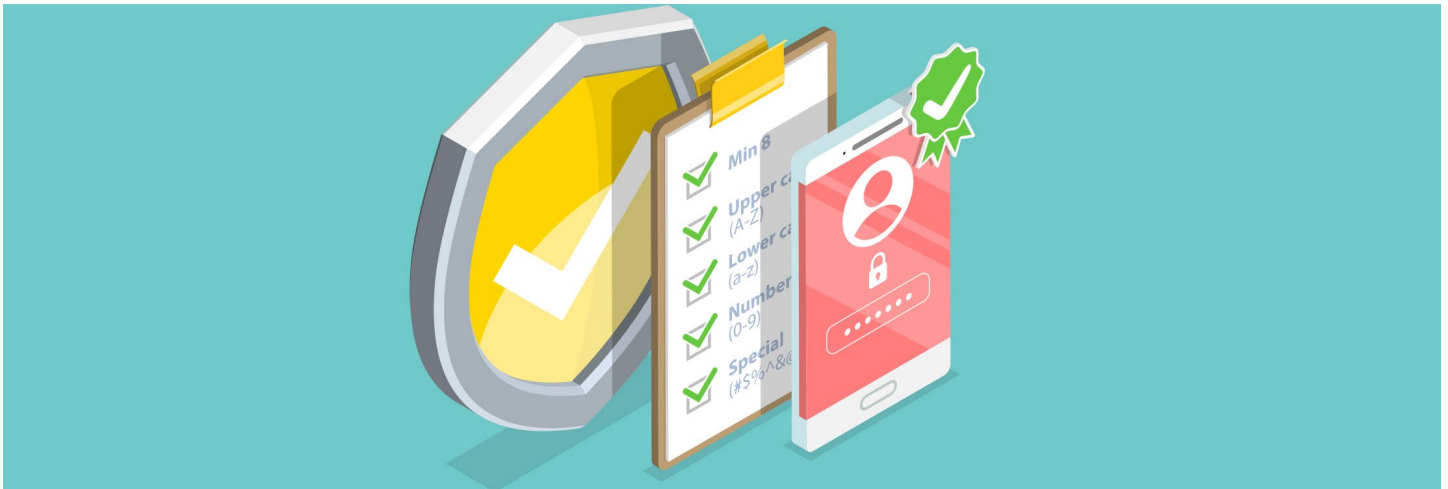


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## Don't Forget Your Digital Assets and Legacy in Your Estate Planning

**We are getting old — especially Bill. Planning for how our assets will be handled after we pass on has suddenly become very important.**

“A competent estate plan, in this day and age, must include the preservation and transfer of digital assets as essential components.”

We own a bunch of gadgets and other electronic stuff. OK, so most of it is — or will soon become — obsolete electronic recycling fodder. But we both have some valuable digital stuff, and we bet that most of you do, too. A competent estate plan, in this day and age, must include the preservation and transfer of digital assets as essential components.

Now, you may ask: “What are the digital assets you are talking about?” Those assets include all electronic information and records that you own or possess, such as digital photos, stored films and movies, e-books, all information in cloud accounts, social media accounts, digital subscriptions, online access to financial assets, websites, trademarks, personal information stored electronically, cryptocurrency, nonfungible tokens (NFTs), online access to bank and investment accounts, credit card rewards, email accounts and so forth.

The Digital Legacy Association is an excellent resource for guidance in these matters. It defines digital legacy as the following: “the digital information that is available about someone following their death. Someone’s digital legacy is often formed by information that they leave online. This may include any website or blog listings about the person, their social media profiles, photos, videos, gaming profiles and interactions they have had online.”

It defines digital assets as follows: “possessions that are purchased, stored or available on digital devices or online services. These may include photos, videos, music, websites, blogs and eBooks.”

How do you properly plan for the preservation and transfer of these assets? First, you prepare a will, but the will cannot be the type we traditionally think of. It must contain specific provisions and directives on how to deal with your digital assets and digital legacy. (A good place to start is the Revised Uniform Fiduciary Access to Digital Assets Act [RUFADDA].) That means having a clause that addresses the issue of digital assets. It should specifically address a fiduciary's access to digital assets, electronic communications and online accounts. Your financial power of attorney should address the same issues.

But that is not enough. You need to discuss these assets with your loved ones. You need to prepare an inventory of all your digital assets and accounts, which includes passwords, hardware, subscriptions, etc. Put that information in a safe deposit box or other safe, secure place. To make the process easier after you're gone, make sure you have implemented a password manager and provided information on how to access your cellphone (which will come in handy on two-factor authentication). This all needs to be accomplished in accordance with the provisions of RUFADDA.

It is a good idea to consult with a "techie" or someone who is knowledgeable about this stuff. For example, do you want

your Facebook page to survive you? Do you want to leave your Instagram photos posted? Make your wishes clear.

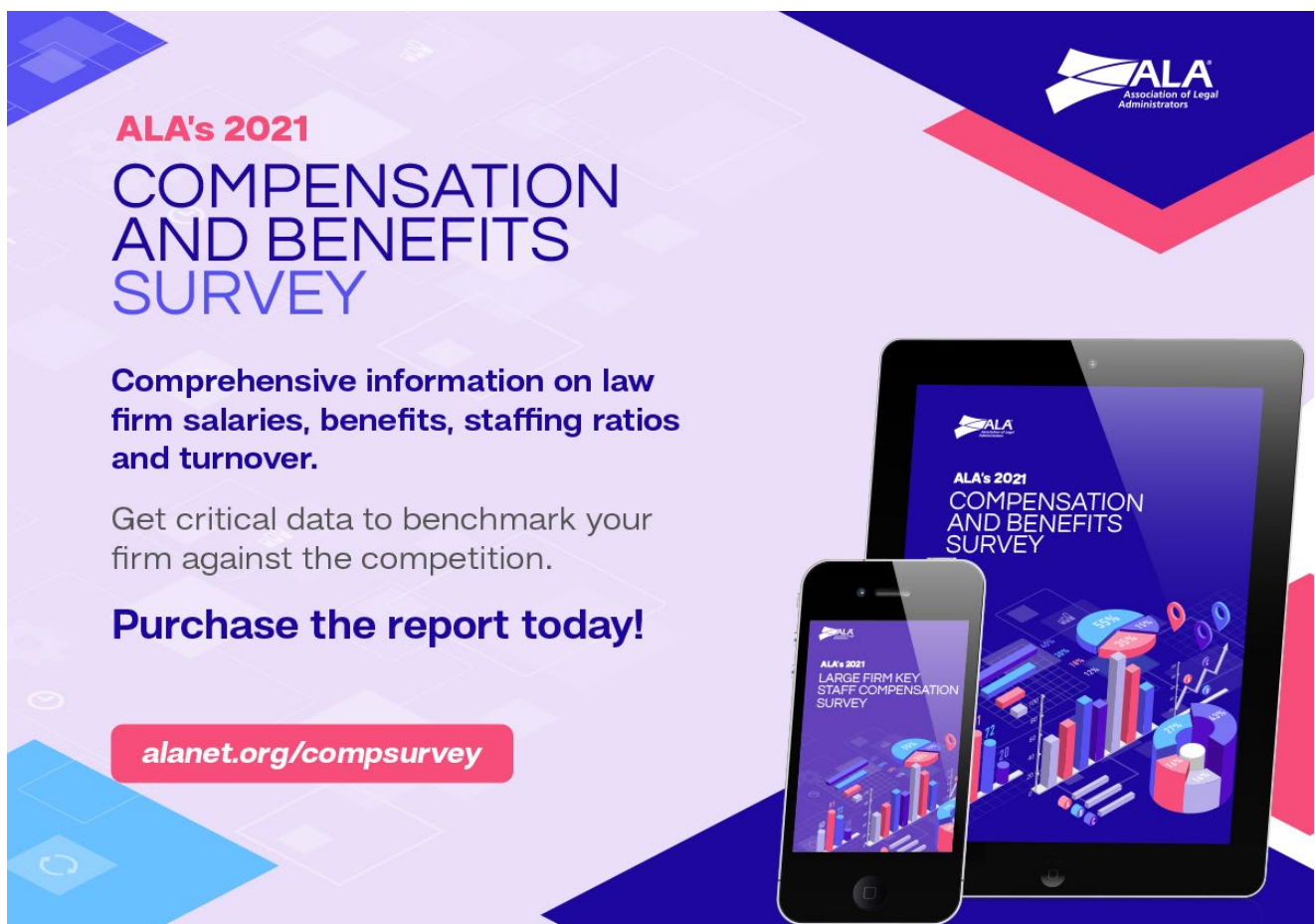
At a minimum, you need to have all your digital assets locked down and secure to prevent the risk of identity theft. You can put your wishes in your will or in a separate document left for those who will be handling your matters. If handling this is over the head of your executor, give your executor guidance on who to turn to for advice in these technical, digital matters.

There are many complicated issues in this area. Just make sure have fully considered and provided for your digital assets and your digital legacy before it is too late. We hope we did not burn you out with this article. But as our world continues to digitize, we feel addressing these matters is really important.

#### ABOUT THE AUTHORS

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

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**JAMES HARRISON**

Founder and Chief Executive Officer  
INVISUS

“Firms can provide much needed peace of mind to their attorneys and staff by offering comprehensive personal and home cyber protection as a benefit.”

# Protecting Employees: The Rising Need for Personal and Home Cyber Protection

It’s the digital age, and personal cybercrime and identity theft cases continue to skyrocket. Law firm professionals have the opportunity and even the responsibility to help protect your employees against these devastating risks.

For very good reasons, Americans now rank criminal hacking and identity fraud as the No. 1 threat to their safety and prosperity. Firms can provide much-needed peace of mind to their attorneys and staff by offering comprehensive personal and home cyber protection as a benefit.

## CYBERCRIME BEYOND THE OFFICE

The global pandemic has had a dramatic impact on the rapid move to information digitization and online access. Many people now work from home at least part-time. We rely heavily on streaming services, email, text and digital commerce from personal computers and smart devices.

These trends have also inspired a major shift in how criminals approach fraud. More than ever, cybercriminals are targeting individuals directly. Statistics like these only tell part of the story:

- » 16.7 million people were victims of identity theft last year
- » Over \$56 billion was stolen directly from consumers last year
- » 1 in 3 personal computers are infected with hidden malware
- » 1 in 5 Americans have been a victim of ransomware attacks
- » 2020 saw a 79% increase in account takeover fraud



The year 2020 broke all records for data lost in breaches and the sheer number of cyberattacks against individuals and families. You are now 40 times more likely to be a victim of a personal cyberattack or identity fraud than home burglary.

The cybersecurity protections you've implemented in the workplace to prevent data breaches do not extend to protecting your employees and their families at home. With the above statistics in mind, now is a good time to consider how those protections could be extended beyond the walls of the office to provide security to your employees and their families.

## THE RISKS FOR EMPLOYERS

When an employee becomes a victim of cybercrime or identity fraud, they aren't the only ones who suffer. Your firm can also take a big hit.

### Risk 1: Employee Disengagement

Distractions from identity theft, financial fraud or other personal cybersecurity problems create disengagement from work and can become a significant drain on an employee's productivity. Distractions also cause errors, including careless security mistakes. You can help prevent disengagement by helping employees resolve personal cybercrime or identity theft problems quickly and completely.

### Risk 2: Data Breaches

A 2020 Stanford University survey found that approximately 88% of data breaches are caused by employee error. By making personal cybersecurity and good cyber hygiene a focus, you can create a stronger culture of security with situational awareness for cyber threats within your firm.

### Risk 3: Compliance

Domestic and international data security and privacy regulations — such as the Fair and Accurate Credit Transaction Act (FACT Act), Fair Credit Reporting Act (FCRA), Health Insurance Portability and Accountability Act (HIPAA), Gramm-Leach-Bliley Act (GLBA) and General Data Protection Regulation (GDPR) — all mandate the protection of client and employee data against data breaches. If a company fails to comply with current standards, the penalties and cost of recovery can be massive. Providing personal and home cyber protection keeps security top of mind and bolsters your firm's data security and privacy policies.

### Risk 4: Work from Home

Work-from-home settings present several cybersecurity challenges for firms, including the use of personal computers



and devices, home Wi-Fi security, and keeping computers and documents inaccessible to family members. Data breaches surged over 300% last year due to the risks that came with employees working from home. A good employee cyber protection benefit helps minimize the security risks in remote work environments.

### Risk 5: Business Reputation

It's no secret your firm's success is directly tied to its reputation. And your reputation is the first thing to take a hit after experiencing a data breach or other security incident that leads to employee and client data theft. Employee cyber protection plans can proactively reduce data breach risks and the associated reputational damage by keeping cybersecurity top of mind for every employee and by helping better secure home offices and other remote work settings.

## SELECTING THE RIGHT PROTECTION BENEFIT

With several identity protection services on the market, selecting a comprehensive employee protection benefit can be tricky. Don't confuse identity protection with full cyber protection.

While identity monitoring is an important part of any protection benefit, it represents just one small portion of a complete personal and home cyber defense program designed to protect an employee's identity, finances, online privacy, and their home network, computers and devices.

When comparing benefit plans, you shouldn't settle for any service that doesn't include at least the following:

- » **Cyber support hotline:** Live expert support for any questions or concerns about cybersecurity, identity theft and online scams or threats
- » **Full identity protection:** Monitoring and protection for all types of ID fraud including credit fraud, tax return fraud, medical ID theft, Social Security fraud, account takeover and more
- » **Dedicated recovery advocate:** Personal expert support from start to finish for full recovery
- » **Financial protection:** Reimbursement for identity recovery expenses and fraud losses
- » **Online privacy protection:** Social media monitoring and other privacy resources
- » **Home network and device security:** Protection and expert support for home Wi-Fi, computers and mobile devices
- » **Home technical support services:** On-demand security and tech support services
- » **Ongoing education and awareness:** Cybersecurity news, scam alerts and updates
- » **Family coverage:** Protection for spouse and children
- » **Year-round enrollment:** No restrictions on when employees can get coverage
- » **Easy implementation:** Seamless integration with your processes and systems
- » **Flexible benefit plans:** Options for voluntary enrollment or employer-sponsored

## THE CASE FOR EMPLOYER-PROVIDED PROTECTION

More employers are starting to invest in cyber protection for all employees — at least individual coverage. While the following list is by no means exhaustive, it outlines some of the top reasons why employers are investing in employee cyber protection.

### Benefit 1: Attract and Retain Talent

Providing this quality of benefit for all personnel helps attract and keep top people. Why? Because they see how much you value their security and peace of mind in today's digital age.

### Benefit 2: Keep Security Top of Mind

Informed employees make better decisions with their personal and professional cybersecurity. Providing this benefit to all employees helps strengthen the overall level of security within your company by sending a strong message about the importance of good cyber habits and protecting confidential data.

### Benefit 3: Get a Tax Break

This benefit is a write-off! The IRS allows employer-provided identity protection as a nontaxable, nonreportable employee benefit.

### Benefit 4: Keep Costs Down

By covering all personnel as a group, you ensure the lowest rates on providing this benefit.

With mounting cybersecurity concerns and dynamic changes in technology and the workplace, providing personal and home cyber protection to employees is one of those unique benefits that has enormous return on investment for both the firm and its personnel. It also helps fulfill corporate social responsibility (CSR) initiatives with a commitment to the security and financial wellness of your employees and their families.

#### ABOUT THE AUTHOR

**James Harrison** is the Founder and Chief Executive Officer (CEO) of the cyber defense solutions company INVISUS. As chief strategist and product visionary for INVISUS, he led the development of the company's cybersecurity, identity theft and InfoSafe® data breach compliance and breach response program that protects law firms, businesses and organizations throughout the United States and internationally. Harrison frequently writes for, speaks and trains in a wide variety of industries and trade groups. As the head of an ALA VIP business partner, Harrison has presented and trained at several national ALA conferences and chapter meetings.

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**DIGITAL MAILROOM**



**ONLINE PAYMENTS**



**BRAD SMITH**

Technology Expert  
TurnOnVPN

“Encryption uses cryptography to conceal information by altering it so that it appears to be random, unintelligible data.”

## How Encryption Can Protect Your Clients' Confidential Data and Intellectual Property

Information security is vital for every business. Adequate data security is even more important for legal organizations considering they are entrusted with highly sensitive data about their clients, including health care information, financial reports and information about trade secrets.

Like any other organization, law firms are vulnerable to malware, phishing, MITM (man in the middle), and other attacks. Plus, firms are increasingly becoming a favorite target for hackers. They hold confidential data such as personally identifiable information (PII), intellectual property, corporate financial details and emails, which are all highly attractive targets for hackers.

With that in mind, clients are starting to demand that law firms have security measures in place to ensure their data is protected from online threats. So what can legal professionals do to ensure the security of their client's data and that of the firm? Well, for starters, they can encrypt it. It's one of the best tools when it comes to protecting sensitive data.

Encryption uses cryptography to conceal information by altering it so that it appears to be random, unintelligible data. With encryption, you need a password to view data stored on hard drives, computers, smartphones and in the cloud, as well as in transit data on the internet. It also makes it harder for cybercriminals to gain access to your systems and steal sensitive information.

### WAYS THAT DATA CAN BE ENCRYPTED

Encryption ensures that if hackers were to breach your system and steal data, they wouldn't be able to use it for nefarious activities because it's scrambled and unintelligible.

Here are some of the ways through which you can encrypt data and make it more secure for your legal organization.

### Smartphones

We store tremendous amounts of sensitive data on our smartphones and tablets. Fortunately, these mobile devices come with built-in encryption features to protect your messages, photos, documents and any other personal data stored on the device. This ensures that should a smartphone be stolen or lost, the data is still safe. The latest versions of iOS and Android devices are encrypted by default.

### Computers and Laptops

Staff use computers to store sensitive personal or work-related information, creating cybersecurity risks, especially as more firms embrace work-from-home arrangements. Laptops are especially vulnerable to theft and can easily fall into the wrong hands. Fortunately, you can protect laptop computers and all the information stored in them with full-disk encryption.

Popular computer operating systems such as Windows and macOS have built-in encryption to help secure your data. BitLocker, the Windows full-disk encryption feature, allows you to encrypt the entire OS drive and other drives mounted to your PC. The built-in macOS FDE tool, FileVault, protects your entire drive.

### Online Traffic

You can also encrypt your network by using a virtual private network (VPN). This tool offers one of the best ways to protect sensitive information in transit, as a VPN scrambles your internet traffic and routes it through a secure tunnel to keep it secure from online threats. The VPN also hides your IP address so no one can tell your location. In fact, using a VPN for traffic encryption is one of the most effective ways to protect information on the internet.

### Email

Every day, we transmit a lot of sensitive data in emails and attachments. If you are not careful, hackers can intercept your emails and steal confidential information. Fortunately, you can reduce the risk of email attacks by encrypting your emails. Most email clients, including Gmail and Outlook, use a secure HTTPS connection.

This means that your emails are encrypted using a standard Transport Layer Security (TLS). Some mainstream email clients use additional encryption standards to keep hackers and other threat actors out of your email communications. Some of the most common encryption standards used by email clients include OpenPGP, GNU Privacy Guard (GnuPG) and Mailvelope.

### Messaging Apps

Billions of people across the world use popular messaging apps such as WhatsApp, Telegram and Signal to communicate. To ensure privacy, messaging apps come with built-in encryption, which not only improves privacy but also facilitates secure communication. The level of security and privacy varies from one chat app to another. Signal is said to have the most secure protocol out of all the popular messaging apps.

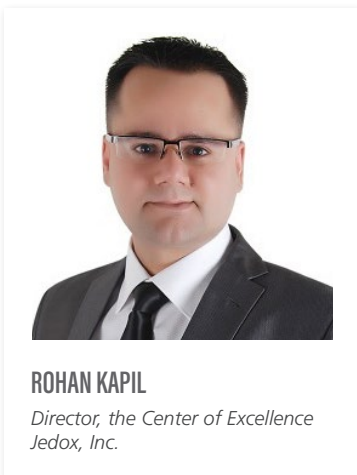
Your legal organization's information is valuable, which will always make it an attractive target for cyberattacks. But encrypting it is one of the best tools legal professionals can use to protect their clients' sensitive information and intellectual property.

#### ABOUT THE AUTHOR

**Brad Smith** is a technology expert at TurnOnVPN, a nonprofit promoting a safe and free internet for all. He often writes about his dream for a free internet and unravels the major flaws behind big tech.

 [turnonvpn.org](https://turnonvpn.org)





“Artificial intelligence (AI) is not just a buzzword, but a true sign of modernized, agile processes that offer real-time insights at the click of a button anytime, anywhere.”

## The Adoption of Artificial Intelligence for Law Firms

**The way we live and learn has changed dramatically in the past 20 years. Generation digital has taken center stage as old systems give way to a more digitalized environment. Due to heavy regulation and more traditional business models based on time-intensive activities, law firms have been particularly slow in adapting technological advances.**

At the same time, the digital transformation journey is a necessity to keep pace with the world’s increasing complexity. While spreadsheets and paper-based workflows can be helpful, they alone are no longer suitable for running a profitable law firm, much less for engaging in efficient financial planning and management. Using the full value of financial and operational data is the key to unlocking long-term success for law firms and businesses in the legal industry.

### AI ADVANTAGES

Artificial intelligence (AI) is not just a buzzword, but a true sign of modernized, agile processes that offer real-time insights at the click of a button anytime, anywhere. Law firms that have this capability enjoy a competitive advantage over more traditional approaches to data management.

According to a recent LexisNexis study, 92% of those surveyed planned to increase their adoption of AI to use for legal analytics in the next year, while 68% said they already relied on their legal analytics to price out projects. Around 73% of the companies are already using AI to gain competitive insights on opposing counsel, parties and judges, while 59% rely on AI to assess cases and 48% use it for case strategy. AI is a powerful automation tool that can take over repetitive, manual tasks, thereby freeing up precious resources such as time and money.



Within the context of financial data management, AI can be particularly useful in saving time on reporting and cyclical activities. Essentially, AI is nothing more than a set of algorithms based on statistics and numbers. It does not replace human hands, but rather augments their power to do more value-driven tasks. It raises confidence levels without a built-in bias while helping turn data into insights faster by recognizing patterns to identify future events. In addition, it puts an end to spreadsheet chaos with an inbox overflowing with multiple iterations. Instead of sorting through overwhelming amounts of data by hand, this process finds patterns for the user to pivot quickly when needed.

Not only does AI support the finance function in planning, budgeting and forecasting, but it also provides the basis for any kind of planning needed throughout the enterprise. Whether it is for client acquisition and management, HR, sales or marketing, the tool can be used to make accurate assessments in real time and on the spot. No matter the area, the need for analyzing data from multiple sources in real time remains the same.


By adding depth and speed to your forecasts, you can present different strategies for fixed, negotiable and controllable costs, thereby more accurately predicting demand and freeing up working capital. AI can help you increase workforce utilization and stress-test key assumptions and recommendations around capital projects. Based on various scenarios, it can help inform strategic business-critical decisions. Predictive forecasts based on these scenarios improve your decision-making ability.

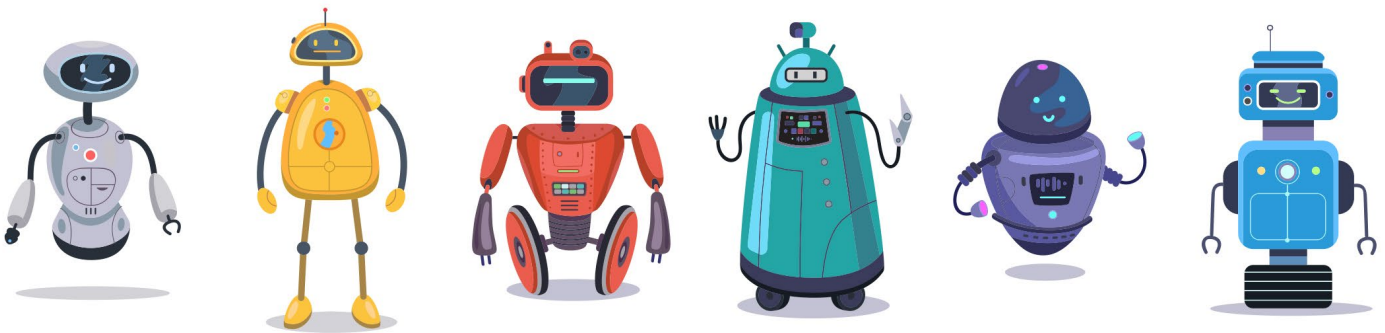
While AI thrives in a data-heavy environment, a new trend is emerging that indicates even small amounts of data from various sources can provide real-time insights through AI technology.

According to Gartner, 70% of businesses will make the shift from focusing on big data to so-called “small and wide data” by 2025. This will allow leaders to specify the context of their analytics rather than relying on massive amounts of data to gain insights. As a result, historical data to predict future events will be replaced by better forecasting models. Stakeholders can leverage AI for more quality and automation in forecasting, for new insights and recommendations for performance management, and to identify key drivers for simulating the future of the business.

#### ABOUT THE AUTHOR

**Rohan Kapil** is the Director of the Center of Excellence for Jedox, Inc. He holds an MBA in Strategy and Finance and a bachelor's in Engineering in Computer Science. He has 14 years of experience in the enterprise performance management (EPM) space solving critical planning and budgeting problems and executing complex projects to enable ambitious growth. Skilled at translating granular financial and nonfinancial information into actionable intelligence, he helps companies of all sizes enhance executive decision-making and mitigate potential risks to improve business performance.

 [jedox.com](https://jedox.com)

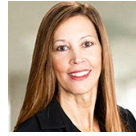


# Anniversaries, Awards and Appointments

## Members on the Move »



**Jennifer L. Bettencourt**, an independent member, is now Senior Business Development Manager at Foley Hoag, LLP, in Boston, Massachusetts.



**Robyn Campbell**, a member of the Las Vegas Chapter, is now Office Administrator at Garg Golden Law Firm in Henderson, Nevada.



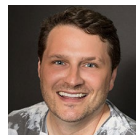
**Kathee S. Nelson, CLM**, a member of the Oregon Chapter, is now Executive Director at Wool Landon in Portland, Oregon.



**David E. Otte**, an independent member, is now Chief Operating Officer at Jackson Lewis PC in West Harrison, New York.



**Stephen C. Wolf, CLM, CPA**, a member of the New Orleans Chapter, is now Chief Operating Officer at Deutsch Kerrigan, LLP, in New Orleans, Louisiana.



**Richard L. Wood, MBA**, a member of the Puget Sound Chapter, is now Executive Director at Preg O'Donnell & Gillett, PLLC, in Seattle, Washington.



## Sending Our Condolences



We are saddened to report the passing of ALA member Mark S. Tallent, 63. Tallent was Firm Administrator at Farrar & Bates, LLP, in Brentwood, Tennessee, and a member of the Middle Tennessee Chapter. He had long been a dedicated volunteer at the chapter, regional and international levels of this Association. Tallent was in the midst of serving a term on the Business Partner Relations Project Team. Previously, he served as Chapter President, Vice President, Treasurer and Newsletter Editor, as well as a Regional Representative in ALA's former organizational structure.

In 2020, Tallent was honored with ALA's Outstanding Association Volunteer Award. He was recognized alongside other 2020 and 2021 award recipients at the Association Awards Presentation at the 2021 Annual Conference & Expo. Our thoughts are with his family, friends and colleagues.

ALA is saddened to report the passing of retired member Gene E. Henson, 96. She spent most of her career in the legal field and in 1965 became the Firm Administrator for Smith, Currie & Hancock in Atlanta, Georgia. She remained in that position for 25 years. Henson was a founding member of the Atlanta Chapter of ALA and served as its President for 1987–1988. In 1990, she was made a lifetime member of the chapter; in 2004, the chapter created the AALA Gene Henson Scholarship in her honor. It awards \$5,000 to an outstanding local senior who is interested in attending one of Georgia's accredited higher learning institutions.

Henson also served ALA on the international level. After her retirement, she continued to be involved in her community, serving on the boards of the Gwinnett Council for the Arts, the Vines Botanical Gardens and the County Seat Players. Contributions in her memory may be made to the Gene Henson Scholarship Fund. Our sympathies are with those who knew her.

# What's Happening at Headquarters

There's always a lot going on at ALA headquarters in Chicago. Here's a snapshot of what's in store for the coming weeks.



## Volunteer Application Deadline Extended

The deadline to apply for a volunteer role with ALA's standing committees and project teams has been extended to October 26. That means you have over two weeks to fill out the application for a position on one or more of the following:

- Business Partner Relations Project Team
- Certification Committee
- Diversity, Equity, Inclusion and Accessibility (DEIA) Committee
- Membership Development Committee
- Product and Service Review Committee
- Professional Development Advisory Committee
- Standards Review Committee

You also still have time to recommend a colleague who you think may be a good fit for such a role. ALA will reach out to the individual with information regarding volunteer service and instructions on how to express interest. They won't be under any obligation to apply, but many potential leaders just need a friendly nudge to dive in. Visit [alanet.org/volunteer](http://alanet.org/volunteer) for details.



## Stay Tuned for Annual Conference Coverage!

Several *Legal Management* staffers have just returned from attending the 2021 Annual Conference & Expo in Austin, Texas. Rest assured that they're hard at work putting together a recap of all the action for your reading pleasure in the November/December issue of the magazine. It comes out November 19 — be sure to check your inbox! In the meantime, you can check out our coverage from on-site in Austin: [legalmanagement.org/lm-extras](http://legalmanagement.org/lm-extras).

## Now Online: The Annual *Legal Management* Print Edition

Yes, the *print* edition is now *online*. This edition is produced annually, but this year's is special: It's in a yearbook format that celebrates ALA's 50th Anniversary. It should have arrived in your mailbox, but if you prefer reading online or want to pass some highlights around, download the digital PDF version.

This 50th Anniversary commemorative issue includes:

- ➕ A look back at the evolution of the legal management profession and where it's going
- ➕ A view of the role business partners have played in growing the industry (bonus: you'll also have a chance to see some fun ads that illustrate technology throughout the years)
- ➕ Interviews with three members who have been members for all 50 years
- ➕ Photos from the many ALA gatherings
- ➕ Yearbook-style autograph pages — get it signed by your ALA friends!



Visit [alanet.org/resources/publications/legal-management-magazine-current-issue](http://alanet.org/resources/publications/legal-management-magazine-current-issue) to download today!



## Check Out Upcoming Education Opportunities



**Webinars:** New webinars are on the horizon. Among them is November 3's You Belong Here: Creating an Inclusive Environment Where Everyone Belongs, presented by Chassidy Deckard, SHRM-CP, and Ellen Rosenstiel, SHRM-SCP, of ALA's DEIA Committee. Participating can help you discover how to be a true ally to employees from underrepresented communities, as well as earn you HR-related continuing education credits. Look for more credit opportunities in future webinars and our on-demand catalog.



**Webcasts:** The slate of free Solutions Series webcasts is filling up once again. Consider tuning in to hear a subject matter expert from one of ALA's valued business partners share their expertise. Upcoming topics include digital mailrooms, management of marketing vendors, and search engine optimization.



**Virtual Member Meetups:** In addition to the ongoing monthly ALA Hangouts and Small Firm Meetups, this member resource also occasionally includes moderated Roundtables about hot topics in the legal industry. Our next Roundtable will take place October 15 at noon Central. Register now to join the discussion on lessons learned about hybrid workplaces.

Visit [lms.alanet.org](https://lms.alanet.org) to learn more about these offerings.





# Listen to Learn

ALA's *Legal Management Talk* podcast features exclusive interviews with industry thought leaders, conference speakers and Association members who are doing great things.

RECENT EPISODES INCLUDE:

-  **The Virtual Effect on Law Firms** with Etan Mark
-  **Building a Trans-Inclusive Workplace** with Ames Simmons
-  **Making Mental Health Matter** with Bella Sterling, MS, MA
-  **Law Firm Life After COVID-19** with Monique Mahler
-  **Redefining the Markers of Success** with Monica Wofford, CSP
-  **Authentic Diversity: Changing the Workplace for Good** with Michelle Silverthorn

 Each episode is **free** and usually **fewer than 15 minutes long!**

**[alanet.org/podcast](https://alanet.org/podcast)**