

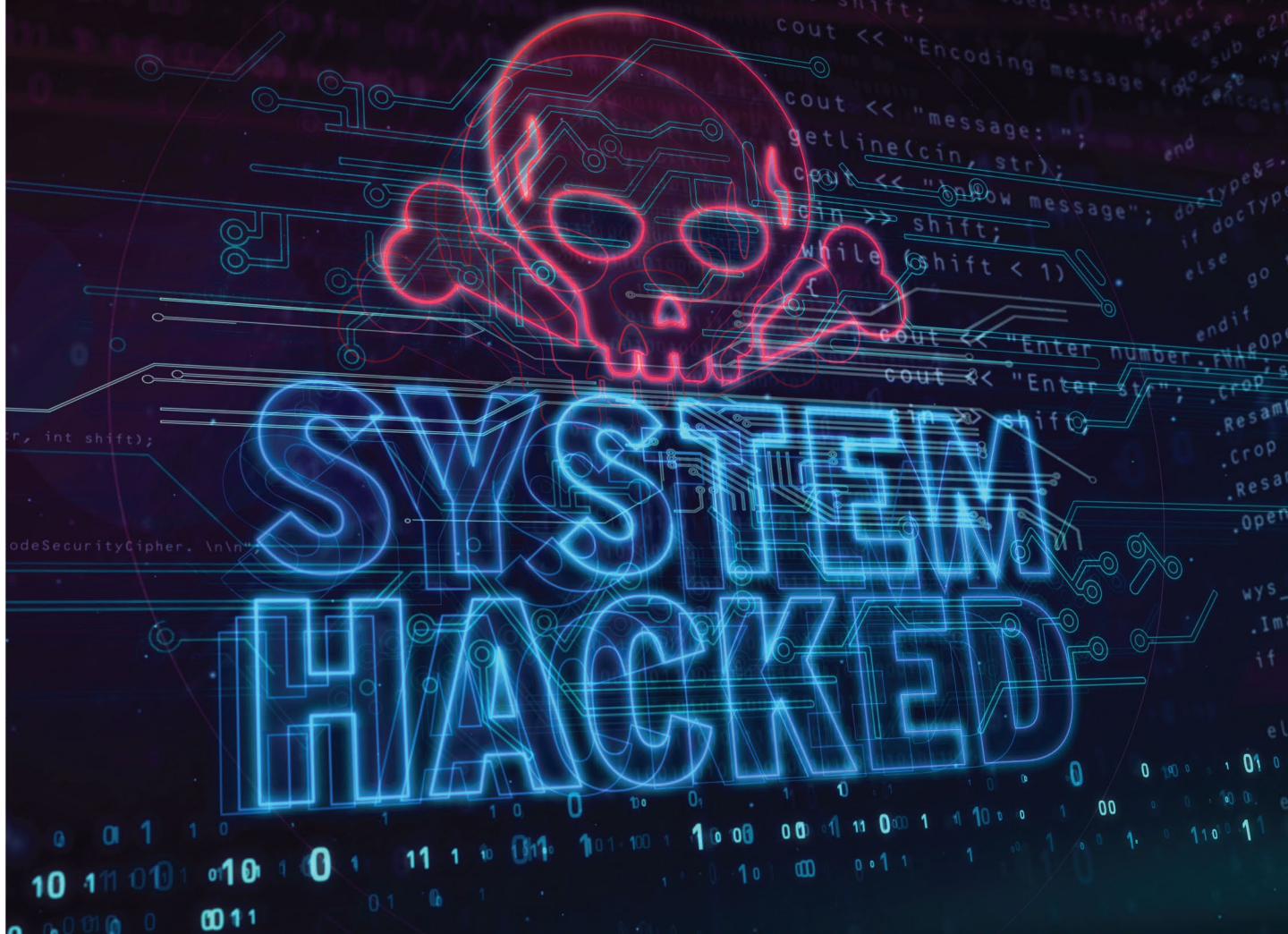
# LEGAL MANAGEMENT

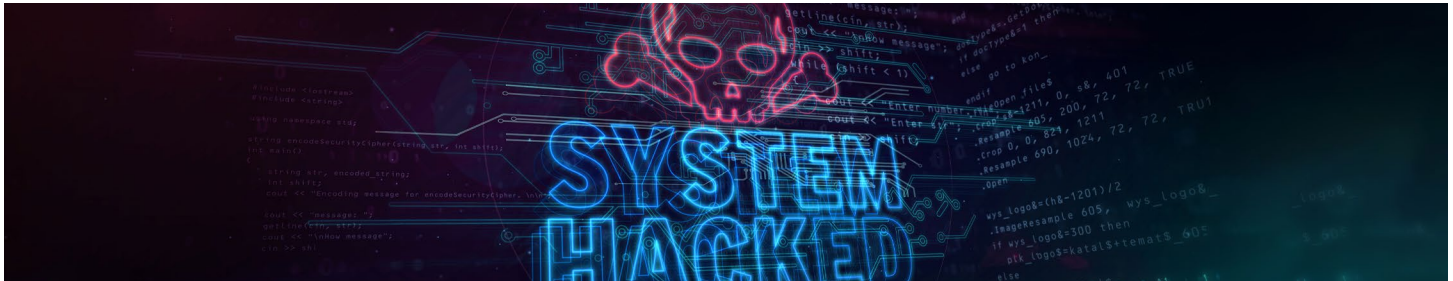
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## 6 Critical Moves to Make When a Data Hack Occurs

As firms face increased and sophisticated cyberattacks, ensuring you know what to do in the face of an attack is paramount.





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“  
Time will tell how this will be exploited. But our job is to determine how our firms will function in the emerging world and how we might leverage these technologies to better serve our clients and elevate the practice and business of law.”

## AI, the Frog in the Kettle, Captain Picard and the Business of Law

**When I was a child in the late 1970s, I played chess against the computer and honed my skills. I got better through practice. Instead of having to rely on finding superior players to teach me or practice against, I could practice against a computer that knew all the gambits and chess moves that it had stored as algorithms to emulate the best chess players in the world. (And I could do it at 1 a.m. if I wanted to.)**

In other words, we've all been using AI in ways we might not have considered. In fact, people who play video games have interacted with AI regularly. “Star Trek” fans have emulated AI for decades, too. The Starship Enterprise could converse about combat strategy, provide information on an alien life form, locate a crew member, and perhaps the most scandalous thing to us all — occasionally give legal advice to the captain. When you search on Google, you are using AI and are guided through algorithms based on what it thinks is most relevant, in the way the algorithm is configured to define it.

But AI is not just for games, predictive searching or learning. It helps us in everyday life in ways many people do not think about. Nearly everyone who uses or accesses anything that incorporates technology uses some sort of AI daily. When our software makes suggestions as we type, we are experiencing predictive AI. Every smartphone made today uses AI for facial recognition. Once upon a time, all these applications were new or novel breakthroughs. Sometimes, people feared them. Then, they became ubiquitous seemingly overnight. Now, we cannot imagine a world without the assistance of AI.

Last November, ChatGPT — a type of generative AI — burst on the scene as it went viral. As a result, many people think of AI in this limited way. As expected, in the last year, the overwhelming interest in AI has produced a glut of information and even conspiracy theories warning us of our doom. Much of this information is capitalism at work with a good amount of misguided advice, and imaginations running with

Hollywood-led themes of AI taking over the world and even destroying the human race. There is a lot of resistance based in misunderstanding and fear from some really smart people. Recently, an Ivy league law school alumnus from a large law firm ranted that using AI in a law practice is malpractice.

## CONCERNS FOR LEGAL

Certainly, caution is warranted. There are legitimate issues to tackle, whether it's loss of jobs to bots; false, fake or revision history; and real-time misinformation. In the legal industry, we see evidence of the fear of incorrect work product, invalid legal advice, inadequate case history and citations, lower standards of legal services, poor document production and even lost billable hours.

One can only surmise at this point how much of a person's behavioral data, online activities data, psychological profiling data and even genetic data are freely handed over by consumers to Amazon and Google. The computer knows enough about you that it can be programmed to respond to you to generate or inspire reactions and provide impulses that generate certain brain chemicals. Dopamine is hard to resist. In other words, it can have you fall in love with it or whatever it wants you to fall in love with like a product to buy. And if you aren't the kind who falls in love easily, it might be able to make you feel like you share a friendship. Sounds like Hollywood, but here we are.

Time will tell how this will be exploited. But our job is to determine how our firms will function in the emerging world and how we might leverage these technologies to better serve our clients and elevate the practice and business of law.

Like any technology introduced to the business world, it is prudent for leaders and users of technology to understand the advantages, weaknesses and proper application — especially if your firm is an early adopter for competitive advantage. As business leaders and professionals, we are passionately driven to achieve a level of understanding so we can make the best decisions. Often, our firms find comfort in what other firms are doing, and perhaps more frequently, what other firms are not doing. This might be acceptable if we are simply trying to learn of innovative solutions or great ideas. But if the firm down the street is not being innovative, then we feel better about not being innovative ourselves. Maybe the reverse is also true: They are not innovative because we are not being innovative. If it means that most of us are only going to do what other firms do, then we are working toward the goal of not having a competitive advantage and being average.



It absolves us of the guilt of not devoting time and resources to raise the level of performance and advance our firm's work product, processes and culture.

Differently, I envision a world in which the best law firms are those that provide top-level client service and legal advice and lead the practice of law by providing relevant legal services, doing challenging and/or complicated and rewarding work, and bringing justice to the future world.

AI will become ubiquitous — ubiquity happens slowly and then suddenly like a frog boiled gradually in a kettle. The frog, the story goes, adapts its comfort to its deteriorating environment gradually while fostering denial to the point it does not realize how bad things are and never knew it was being boiled. Those who do not change go belly up but never thought it would happen to them. Firms that live with deteriorating business conditions and that do not find ways to adapt to the changing world will find their environment inhospitable to their existence without noticing while it happens.

We should be leading rather than fearing. Fear comes with the unknown. Peace and confidence come with understanding and learning. In which disposition do you want your firm to dwell? Consider what actions you need to take to lead your firm there and start today. The world is changing, and it is not waiting for us. So, do not wait any longer.

Disclaimer: I took my own advice. Generative AI was not used to author this article. But I have to give some credit to the AI known as predictive text.

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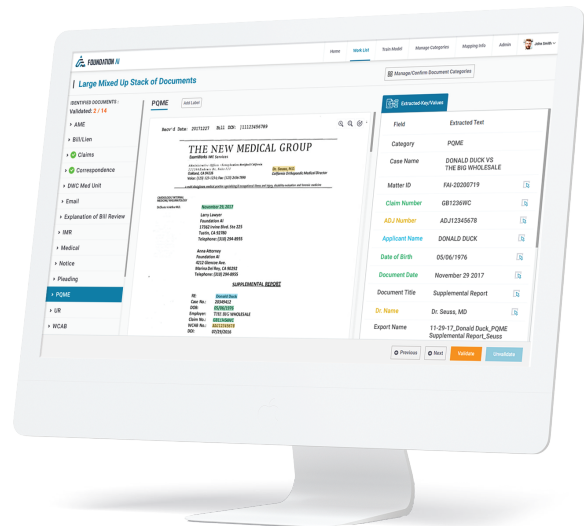
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**BRUCE POLICKY**  
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Success  
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“Many industries use CRM systems (think sales and real estate), but for legal professionals, these tools are a true game-changer, increasing efficiency through automation and expanding the ability to serve clients.”

## Grow Your Practice with Automation Using Legal CRM

In the evolving legal services landscape, law firms are constantly seeking innovative ways to manage and expand their practices effectively. One proven method is using a client relationship management (CRM) system. A CRM is not just a tool, but rather a strategic approach to the people side of a business that helps streamline many areas of a law firm’s communication tasks, from lead generation to client intake and beyond

Many industries use CRM systems (think sales and real estate), but for legal professionals, these tools are a true game-changer, increasing efficiency through automation and expanding the ability to serve clients. For example, a great legal CRM system allows law firms to streamline their processes and nurture client relationships without taking their focus off the all-important task of delivering exceptional legal services. Here are three ways it does this.

**Smart client intake:** Legal CRM should include intuitive client intake solutions that make it easier to customize intake forms for different practice areas, sort out qualified from unqualified leads, sync client data with your practice management software and automate document assembly to move legal matters along more efficiently.

**Marketing automation:** Marketing is necessary for growth, but it can be costly and time-consuming. A legal CRM system can help you get the greatest return on investment (ROI) for your marketing without sacrificing billable hours. It can facilitate lead nurturing with text automation and custom forms, automate email and text sequences, and track engagement to keep potential clients moving along the sales funnel.

**Seamless integrations:** Once a lead becomes a client, an effective CRM system simplifies the transition by seamlessly integrating with your practice management

software. This integration ensures that all client information is transferred between systems, allowing you to skip data entry and focus on providing top-notch legal services.

## CHOOSING THE RIGHT CRM

Selecting the right one for your legal organization is key, as it can significantly impact your practice's efficiency and growth. With that in mind, here are the four questions you should ask to guide your selection process to ensure you find the CRM system that aligns with your firm's unique needs and objectives.

### 1. Is it user-friendly?

The CRM system you select should be easy to use for everyone involved, from intake staff to managing partners. Think of it like a personal assistant to help you with day-to-day tasks; you want someone friendly in this role. Moreover, ease-of-use reduces the time spent on implementation and training and saves you from the challenges inherent in a frustrating system that's difficult to navigate.

A user-friendly CRM system also ensures that staff can adopt it readily, reducing the learning curve and allowing your team to focus on the tasks that matter most. The faster your team can begin to use and master the CRM, the faster you can start reaping its benefits.

### 2. Is it supported by a responsive team?

Even with the most intuitive software, users can run into technical issues. Therefore, choose a software system with a team of knowledgeable customer service representatives ready to assist you as needed.

A responsive support team is not just about solving technical issues; it's about providing guidance and best practices to help you maximize the potential of your CRM system. This support can be invaluable in helping your firm implement the new system, get comfortable with it and use it to its full potential.

### 3. Is it customizable?

Every law firm is unique, which is why you should look for software that can be easily customized and scaled according to your firm's specific needs. This allows you to tailor the software and its capabilities, whether you're a small practice needing to simplify client intake or a large firm requiring advanced features for complex, automated marketing.

Choosing a CRM that can adapt to your needs ensures that your software will grow with your firm, providing lasting value and support as your practice evolves.



### 4. Is it safe?

Security is a major concern for law firms because they manage large amounts of personal data and have a fiduciary duty to keep that data safe. When you use a CRM system, your data stays accessible only to you. Moreover, it can be better protected because of the secure socket layer (SSL) encryption available with cloud servers, two-factor authentication for users and granular permissions that let admins set strict access rules.

## TAKE YOUR FIRM TO NEW HEIGHTS

Embracing innovative tools like a legal CRM system is not just about keeping pace. It's about setting the pace and transforming your practice, enhancing client relationships and driving growth.

So, don't just adapt to the future — shape it. Harness the power of a legal CRM system and lead your firm into a new era of efficiency, client satisfaction and success.

### ABOUT THE AUTHOR

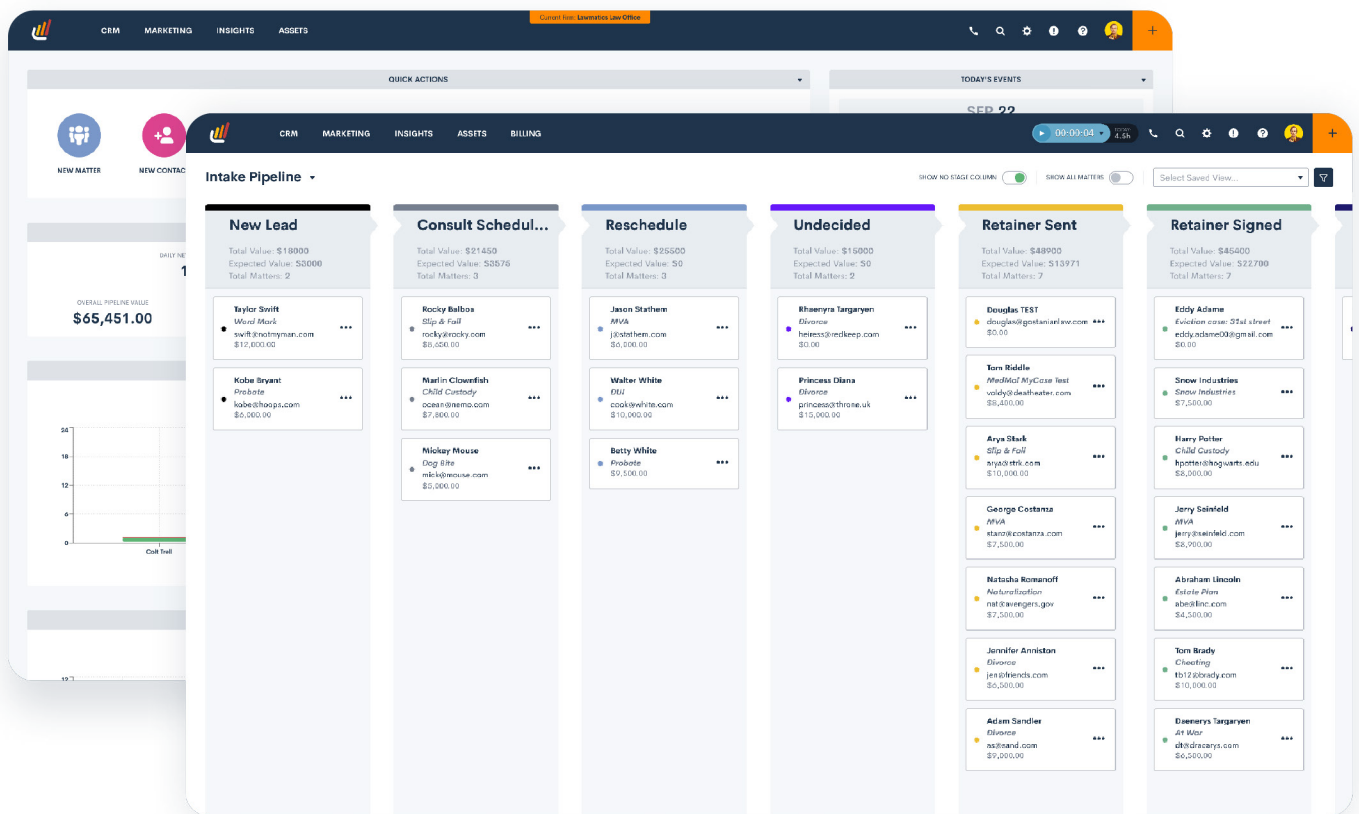
**Bruce Policky** is the Director of Enterprise Sales and Success at Software Technology LLC, the maker of Tabs3 Software. He is responsible for managing all marketing, sales and training activities. Over his 30+ years with the company, he has helped clients and consultants in the legal software industry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

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The screenshot displays the Lawmatics CRM interface, specifically the 'Intake Pipeline' view. The pipeline is organized into six stages, each with a total value and expected value:

- New Lead:** Total Value: \$18900, Expected Value: \$30000, Total Matters: 2. Clients include Taylor Swift and Kobe Bryant.
- Consult Schedule...:** Total Value: \$21450, Expected Value: \$3576, Total Matters: 3. Clients include Rocky Bulbo, Martin Clowdfish, and Mickey Mouse.
- Reschedule:** Total Value: \$25500, Expected Value: \$0, Total Matters: 3. Clients include Jason Statham, Walter White, and Betty White.
- Undecided:** Total Value: \$18000, Expected Value: \$0, Total Matters: 2. Clients include Khaerya Targaryen and Princess Diana.
- Retainer Sent:** Total Value: \$48900, Expected Value: \$13971, Total Matters: 7. Clients include Douglas TEST, Tom Riddle, Arya Stark, George Costanza, Natasha Romanoff, Jennifer Aniston, and Adam Sandler.
- Retainer Signed:** Total Value: \$45600, Expected Value: \$22700, Total Matters: 7. Clients include Eddy Adams, Snow Industries, Harry Potter, Jerry Seinfeld, Abraham Lincoln, and Tom Brady.



**"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."**

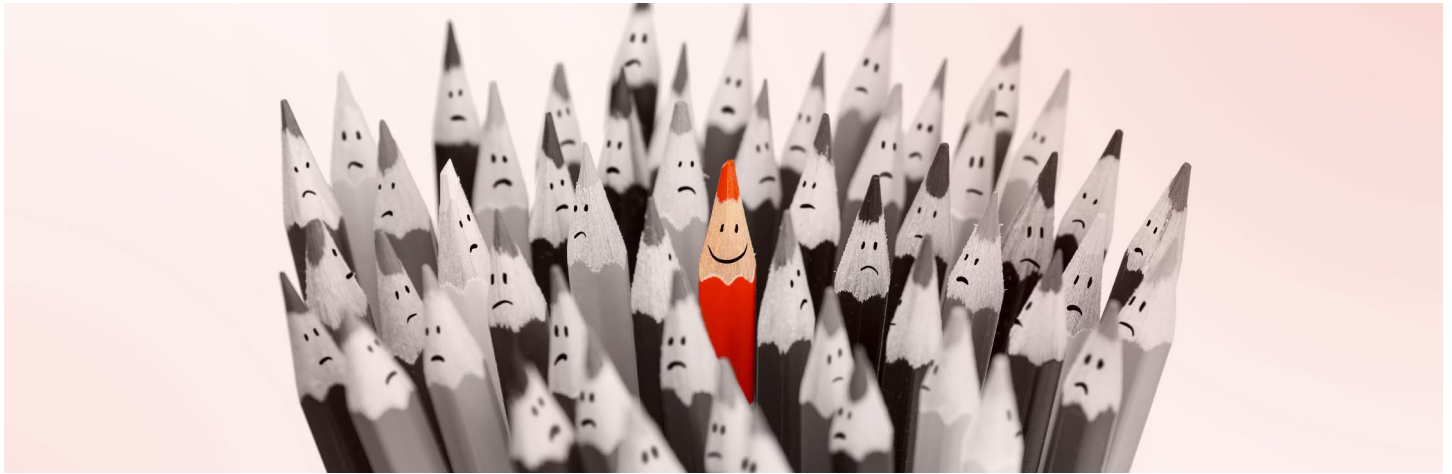
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## Playing the Fame Game: How to Amplify Your Lawyers' Reputations to Stand Out from the Rest

**In the competitive landscape of legal services, how can your lawyers stand out? As someone who has worked with more than 10,000 lawyers for three decades, I've come to understand that it's not just about being a good lawyer — it's also about being recognized as one. In an industry teeming with skilled lawyers, the question isn't just about who has the best credentials, but also who shines the brightest. It's a game of being the tree in the forest that makes a lot of noise when it falls.**

“  
The essence of playing the fame game lies not just in showcasing skills, but in strategically positioning lawyers to be at the right place at the right time.”

And that noise must be good noise, noise that will be recognized and remembered in niche areas, and noise your lawyers will feel comfortable making. Being salesy and blatantly promotional won't sit well with your lawyers or their potential clients, so we must find approaches that resonate with both groups.

To truly rise above the rest, lawyers must be seen as a better choice than their contemporaries. And to be seen, they must be known. This goes beyond just having practice areas or having a track record of success. It means proactively positioning your lawyers in ways that stand out from others by understanding what buyers of legal services respect, what information they need, where they get that information (what they read, listen to and where they spend their time online) and where they congregate.

There are two primary arenas where lawyers can amplify their fame: inside the firm and outside with potential clients, referrals sources and the media.

### FAME INSIDE YOUR FIRM

Building reputations within the firm can propel careers forward. This is where future referrals, collaborations and leadership opportunities are born. Here are a few approaches that can help your lawyers enhance their internal fame.

**Leadership Titles:** The title of leader conveys a subtle but powerful message of superiority and trust. Have your lawyers seek leadership roles, even if they're small to begin with. It could be a deputy position supporting another leader, or leading an initiative that has no one in charge but should get done. Taking on these roles creates visibility among other firm members and demonstrates important traits of responsibility, initiative and capability.

**High-Profile Committees and Initiatives:** Being involved in important internal projects or committees can increase their visibility and show commitment to the firm's success. Your lawyers should find projects that resonate with them and give them exposure to lawyers who could refer work to them.

**Form Your Go-To Group:** Have your lawyers build relationships with other lawyers who have complementary practices and whom they will feel comfortable working with. Proactively building these internal friendships enhances the "know, like and trust" factor that keeps lawyers top-of-mind with each other and serves as a precursor to activate more cross-selling.

**Teach and Learn:** Encourage your lawyers to showcase their talents by regularly conducting internal training sessions or workshops. Similarly, encourage them to be curious about what others do so they can be more effective selling the firm's services while deepening internal relationships.

**Cross-Selling Opportunities:** One of the best ways to get noticed and liked is by putting money in someone else's pocket. Urge your lawyers to find opportunities to introduce other firm lawyers to their clients. This creates a quadruple win: The giving lawyer is a hero for finding work for others; the receiving lawyer gets new work; the giving lawyer may get work referred back from the receiving lawyer down the road; and the client solves a problem with a firm they trust.

## FAME OUTSIDE THE FIRM

Potential clients are looking for good lawyers to handle their matters, so your lawyers must make it easier to be found. Here is a step-by-step process for them to do that.

**Identify Your Fans:** First, your lawyers must know and find their target audience by industry, company, title and other details.

**Upgrade Bios and LinkedIn:** This is their first audition for prospective clients, so make it count. Add elements that describe what makes them different, tell success stories and add representative matters.



**Find Emerging Topics:** Have your lawyers write articles or commentaries on contemporary issues or trends that are important to their practice and audience.

**Interview Industry Leaders:** In support of writing and speaking, engaging with top professionals gives your lawyers reasons to meet those people, while also generating third-party credibility by association.

**Participate in Key Organizations:** Your lawyers must be in the room where it happens. Have them join, actively participate and take leadership positions in organizations and groups where potential clients congregate.

**Speaking:** Speaking at industry conferences, seminars and webinars provides a platform where your lawyers can share their expertise while also receiving third-party credibility as thought leaders.

**Digital Footprint:** Have your lawyers stay visible on targeted social media platforms by posting, engaging, sharing and commenting.

**Media Engagement:** Have your lawyers reach out to targeted media sources to serve as resources for quotes and opinions.

**Promote Firm Successes:** Regular press releases or updates about the firm's achievements can provide name recognition and macro branding support for your lawyer's individual efforts.

The essence of playing the fame game lies not just in showcasing skills, but in strategically positioning lawyers to be at the right place at the right time. Whether they're interacting with a colleague down the corridor or writing an article for an esteemed legal publication, each action is another deposit in their fame account.



### WANT MORE INFO ON HELPING YOUR LAWYERS WITH BUSINESS DEVELOPMENT?

Check out the *Legal Management Talk* podcast episodes on this crucial topic! First, hear more from David Freeman on why and how your firm should double down on its business development efforts. Then, Ioana Good, Adrien Maines and Peter Johnson describe how to use data to ensure your attorneys are playing the business development roles they're best at. Give it a watch on our YouTube channel or listen here: [alanet.org/podcasts](http://alanet.org/podcasts).

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**David H. Freeman, JD**, is a member of the *National Law Journal* Hall of Fame for being voted the top law firm business development coach and consultant in the United States for several consecutive years. He is a two-time best-selling author who has written and co-authored 14 books on law firm leadership and business development and has trained and coached over 10,000 lawyers and leaders in hundreds of firms worldwide. Additionally, he is the creator of Lawyer BookBuilder®, an online, self-study program that shows lawyers how to transform themselves into major rainmakers.

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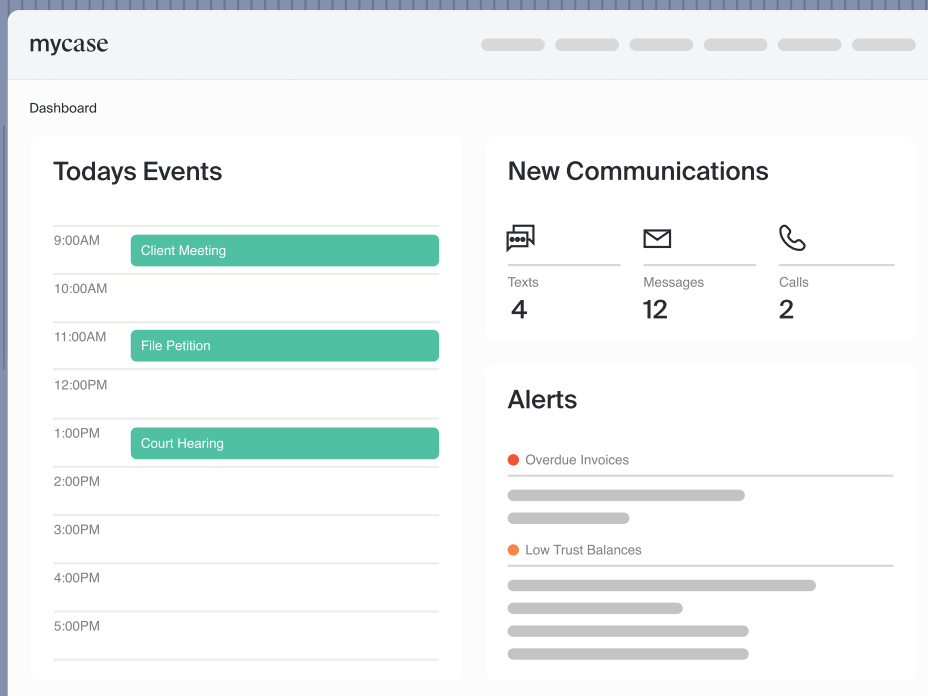


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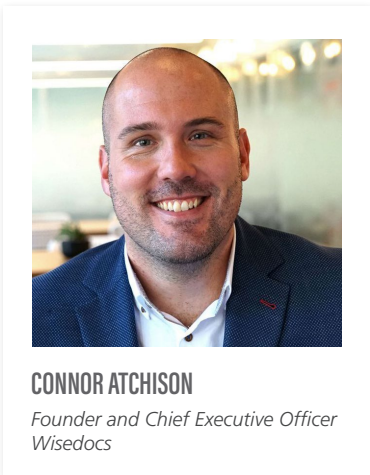
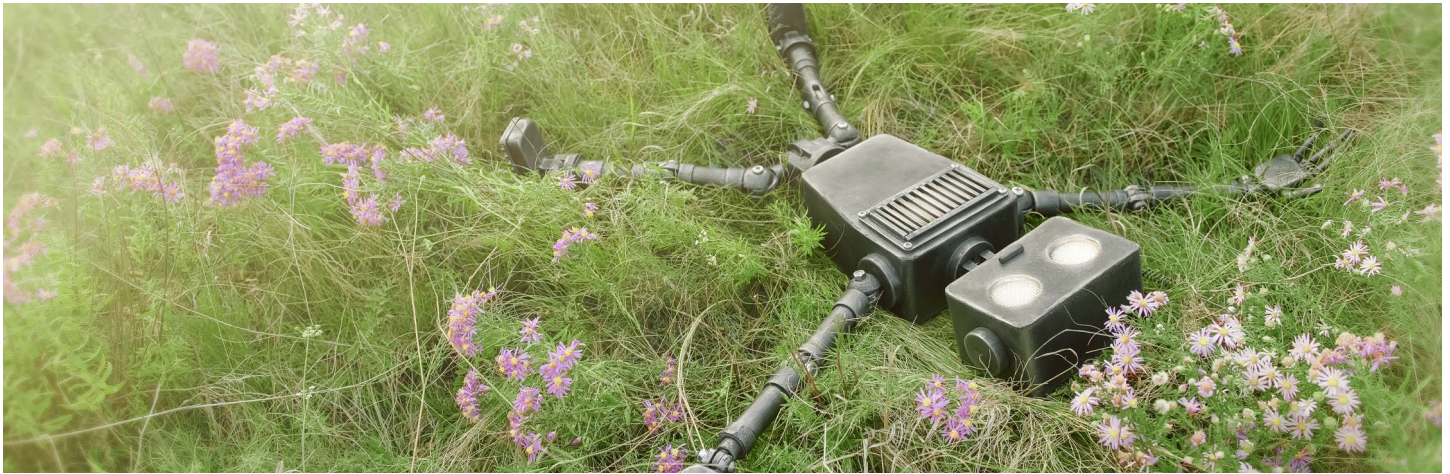
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“Administrative technology can support — not replace — administrative staff. Tasks like scanning documents for details, indexing client files and removing duplicates can save hours if done by a machine.”

# The Transformation of Legal Administration with AI — and Why Law Firms Have Nothing to Fear from the Change

Have you heard of the robot lawyer? Readers of any North American news publication can most likely say yes. The legal chatbot created by tech upstart DoNotPay caused a stir at the beginning of this year when its creator Joshua Browder tried to bring it to court. The robo-lawyer was designed to listen to court arguments over a smartphone, then provide advice to its human “mouthpiece” via an earpiece speaker.

It would have been the first of its kind, but Browder’s creation was banned from the courtroom almost universally, citing the argument that all parties needed to provide consent to being recorded to appear. DoNotPay ultimately recalled their legal bot after the threat of prison time, and the company was sued for misrepresentation.

Evidently, artificial intelligence (AI) didn’t make a good first impression on law firms. Even though the robot-lawyer failed to score points with the judges (it went back to fighting parking tickets), it wouldn’t be the first time AI entered the legal profession. However, in the case of legal administrators, the introduction of AI could be a positive change when used correctly.

## SETTING A PRECEDENT IN LEGAL ADMINISTRATION

Manual work is time consuming, and law firms have plenty of it. In 2008, the average attorney generated about 100,000 pieces of paper per year. Legal administrators are the ones who will process most of these pages, and although paper use might have declined

since then, the number of legal documents has grown. This might explain why 91% of corporate legal departments are expecting a shift towards more technology — even though only a third of these departments say they're prepared to keep pace with the trends.

For legal administrators, new technology presents an opportunity to make their work more efficient, more balanced and less routine. However, in terms of adopting the new tech, law firms have been reluctant to change. For lawyers, this makes sense: Ethical rules around AI in law are fuzzy, opposition to robo-lawyers is understandable, and only about half of legal professionals support the use of generative AI tools like ChatGPT.

However, for their administrative counterparts, today's legal technology is a wonderful change. Administrative technology can support — not replace — administrative staff. Tasks like scanning documents for details, indexing client files and removing duplicates can save hours if done by a machine. To do so correctly, though, the human legal administrator will still need to play a crucial role.

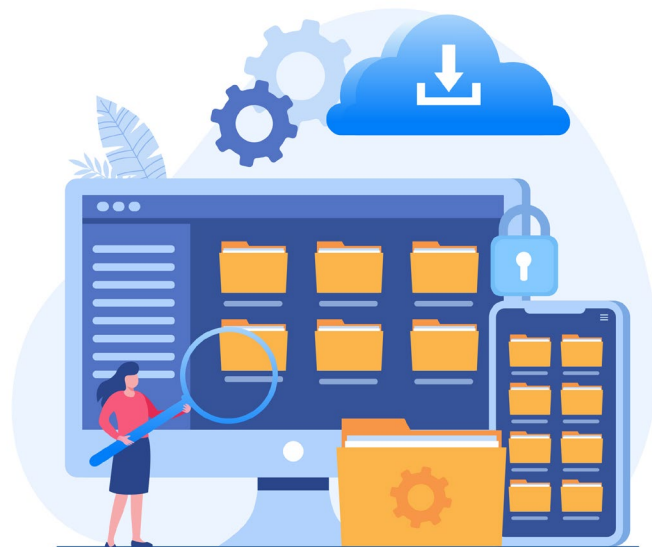
## HUMANS IN THE (LEGAL) LOOP

Ethics might be fuzzy around “robot lawyers,” but for legal administrators, it might well be the new frontier. For example, 30% of law firms are looking to spend more on document management technology, and for good reason: Legal cases are becoming more complex and documents are getting more difficult to manage over time.

Legal administrators are taking on more work at the same time as budget cuts put pressure on the number of staff. When resources are stretched thin, new technology becomes necessary to meet demand. Just like the fax machine, printer or email address in the past, this technology won't replace the human workforce — it will just save them some time. For the administrators, paralegals and other professionals who assist with the recordkeeping and document preparation at a firm, this tech can help them take the focus off paperwork and put it back on to more mentally demanding tasks.

## THE NEW PAPERWORK PARADIGM

Even if the legal practice halved its paper consumption since 2008, scanned documents still take time. If administrators are working under more than one lawyer, these documents can add up. Pages numbering into the hundreds (or thousands) stretch administrative teams thin, making mistakes, overtime or burnout more likely. This is not only inconvenient, it's also costly — for both the firm and their team.



With expenses in law firms rising, the ability to take on more work in less time can mean more — not less — job security. Today's legal administration tech uses AI to sort, index, remove duplicates and scan even unstructured files. This helps improve margins and boosts the number of clients that the law firm can take on.

Even using AI to index a client file so its components can be found more easily can save a large amount of time. Instead of spending hours sorting, removing duplicates or scanning a file, legal administrators can task a machine with the job and pick up another file. This leaves them more time to catch up on more specialized work, helps them do more each day and betters the law firm — and its team — over time.

The robo-lawyer may not have succeeded, but AI in the legal industry is here to stay. As we enter a new digital age, legal administrators don't need to fear for the future of their work. Instead, they can work alongside AI tools to be better, faster and smarter — both in their jobs and over their career.

### ABOUT THE AUTHOR

**Connor Atchison** is the Founder and Chief Executive Officer of Wisedocs, which reimagines claims through bringing automation and intelligent medical record processing and reviews to the insurance ecosystem and their claimants.

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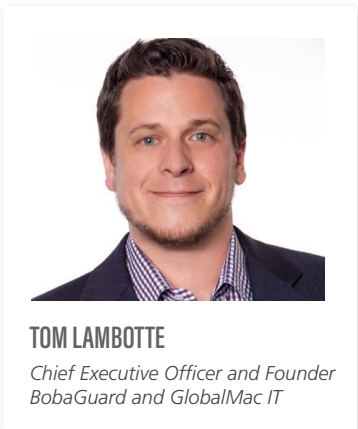
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## Navigating Cybersecurity Threats for In-House IT Teams

**Like a city police force, your in-house IT support works tirelessly to maintain peace and tranquility within your firm’s digital environment. But are they equipped to tackle the hidden world of cybercrime?**

Imagine your law firm as a bustling city. This city is teeming with information and transactions, just like an actual city teems with people and activity. In this city, your in-house IT team plays the role of the local police department. They are the peacekeepers who maintain order amid the constant buzz of activity.

They oversee the city’s infrastructure, handling everything from setting up new systems, maintaining existing ones and troubleshooting day-to-day issues to making sure that the city’s digital traffic flows smoothly. Their familiarity with every alleyway and avenue in your city, their understanding of its unique rhythms and routines, and their immediate availability for technical support make them indispensable assets to your firm.

But imagine if your city suddenly faced an unexpected threat — a threat from a powerful adversary that your police force, despite their skills and dedication, aren’t fully equipped to handle?

### **AN EVOLVING BATTLEFIELD: CYBERTHREATS IN THE DIGITAL AGE**

The digital age has brought with it a new kind of warfare. Cyberthreats have become increasingly sophisticated and insidious, evolving at an alarming rate. They’re no longer the work of lone wolves or small groups. Instead, large, well-resourced and highly skilled cybercrime syndicates often orchestrate them. It’s akin to a hostile military force stealthily planning an invasion on your city.

These modern cyberthreats are meticulously crafted, often designed to exploit the slightest vulnerability in a system. They can come in various forms, from ransomware

“The digital age has brought with it a new kind of warfare. Cyberthreats have become increasingly sophisticated and insidious, evolving at an alarming rate. They’re no longer the work of lone wolves or small groups. Instead, large, well-resourced and highly skilled cybercrime syndicates often orchestrate them.”



that locks you out of your systems, phishing attacks that trick your staff into divulging sensitive information, to advanced persistent threats that silently lurk in your systems, stealing information over time.

Understanding these threats isn't just about knowing what they are; it's about understanding how they operate, how they infiltrate systems and how to stop them. It's a complex, ever-changing field requiring a specialized set of skills to navigate effectively.

This is the unseen battle your law firm faces, the invisible warfare in the digital age. It's a battle that requires more than just a police force. It requires a dedicated, specialized defense team ready to confront these advanced threats head-on.

## **GUARDING AGAINST AN INVISIBLE INVASION**

In-house IT teams often face an uphill battle when it comes to cybersecurity. While they are experts in managing the routine operations of your digital city, they are being asked to also function as an elite defense force against these increasingly sophisticated cyber invasions.

The challenge is two-fold. First, they must stay ahead of the rapidly evolving threat landscape while managing their regular responsibilities. Second, time is a precious commodity, and balancing operational IT tasks and proactive cybersecurity measures can be daunting.

Remember, just because someone can do something doesn't mean they should. While your in-house IT can potentially handle cybersecurity, are they the most efficient and effective line of defense?

## **MANAGED SECURITY SERVICES PROVIDERS: THE SPECIAL FORCES OF CYBERSECURITY**

Enter managed security services providers (MSSPs). Imagine them as the special forces called in to protect your city from the looming invasion. They are the specialists who eat, sleep and breathe cybersecurity. They have the resources, tools and up-to-the-minute intelligence to combat advanced threats proactively.

MSSPs offer 24/7 monitoring, threat hunting and rapid incident response. They stay on top of the newest threats and the best mitigation strategies so your in-house IT team can focus on what they do best. Moreover, the cost-effectiveness of a specialized MSSP might surprise you when compared to the resources required to manage cybersecurity in-house.



An MSSP's focused expertise complements the invaluable work done by in-house IT. Together, they can create a layered defense ready to tackle the everyday and the extraordinary. This isn't about replacing your in-house IT; it's about giving them the support they need to ensure your firm's cybersecurity stands strong against any threat.

This way, law firm administrators who would inevitably face scrutiny in the unfortunate event of a breach can sleep easier knowing they've done everything possible to protect the firm.

In the battle against cybercrime, having both your local police force (in-house IT) and special forces (an MSSP) working together ensures your city — your law firm — is as secure as it can be.

## **THE INTEGRAL ROLE OF LAW FIRM ADMINISTRATORS**

Firm administrators play a crucial role in this digital warfare, just like city administrators would in our metaphorical city. Their decisions, after all, shape the security landscape of the firm.

They're the ones who need to persuade the firm's partners to invest in necessary defenses, the ones who need to understand the gravity of the threat and the ones who, unfortunately, would be in the line of fire should a breach occur.

It's a daunting responsibility, but it doesn't have to be shouldered alone.

## **BUILDING A FORTIFIED CITY TOGETHER**

The cybersecurity landscape is no longer a playing field for generalists. It's a battlefield that demands specialization and constant vigilance. The sophistication and stealth of

modern cyberthreats require a comprehensive, layered defense that combines the strengths of in-house IT with the focused expertise of MSSPs.


Ultimately, it's about safeguarding your firm's reputation, your clients' trust and the peace of mind of all involved, from the law firm administrators to the in-house IT team.


In this battle against invisible adversaries, no firm can afford to go into battle unprepared.

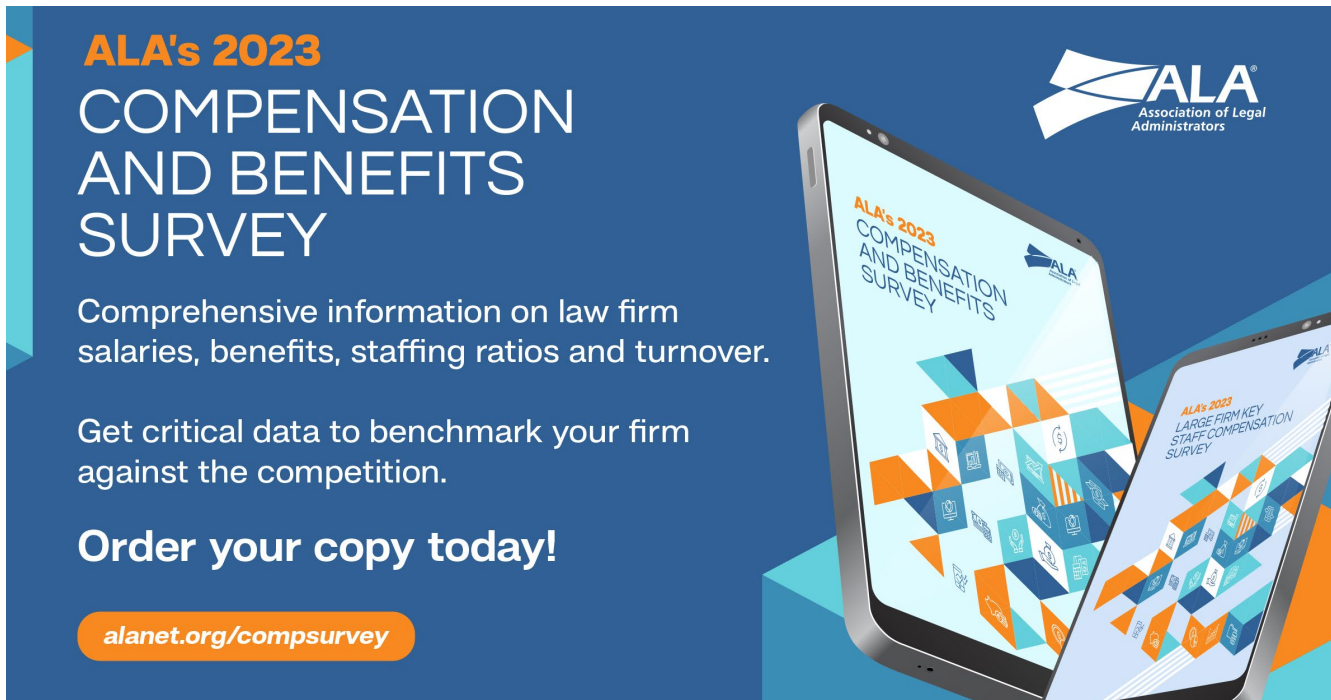
As the saying goes, "The best defense is a good offense." Equip your law firm today with a strong cybersecurity offense to ward off potential threats. After all, your city and firm are worth fighting for.

#### ABOUT THE AUTHOR

**Tom Lambotte** is the Founder and Chief Executive Officer of BobaGuard, a provider of a turnkey data-and system-security solution for law firms. In addition, he is the Chief Executive Officer and Founder of GlobalMac IT, which supplies IT-managed services for small and midsized Mac-based law firms. Lambotte is a cybersecurity expert who has been in the tech support industry for over a decade. Lambotte is the author of *Hassle-Free Mac IT Support for Law Firms*, *Legal Boost: Big Profits Through an I.T. Transformation*, and *Macs in Law: The Definitive Guide for the Mac-Curious, Windows-Using Attorney*.

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“We’ve learned over time that we need to have a process. We can’t just say yes and execute on every idea because not all ideas are great ones, and we [have] finite resources.”

## How Innovation Is Revolutionizing Client Service

*Law firms are increasingly implementing — and creating — technology that’s enhancing operations in new, inventive ways.*

**Technology is one of the practice areas Orrick, Herrington & Sutcliffe LLP focuses on, so it’s not completely surprising the firm has incorporated advanced tech capabilities such as artificial intelligence (AI) into its e-discovery and document review work over the years.**

The 25-office firm, though, is taking an even more tech-forward approach to service delivery — which includes offering a number of self-service tools clients can access via its website.

Some, according to Kate Orr, a former litigator who now serves as the firm’s global head of practice innovation, have resulted from an attorney or practice leader coming to her team with an idea. One firm member has noticed a need for a form clients could complete to obtain specific information about a topic.

Orrick Labs, launched five years ago, builds many of the solutions. But before work starts, the team internally scopes out the project parameters, including the involved requirements and who the end users will be, to understand what needs they’re trying to meet with the proposed solution, how it aligns with the firm’s strategy and the potential return on investment.

“When we see a need in the market for a particular tool — whether for our clients, or just for the market more generally — we work with our lawyers to build those tools,” Orr says. “We’ve learned over time that we need to have a process. We can’t just say yes and execute on every idea because not all ideas are great ones, and we [have] finite resources. If it makes sense to build, we carry the heaviest part of that load and just try to leverage the lawyers for their substantive know-how.”

“If you have data that your competitors do not have, that’s something — even if your competitors were willing to spend all the money in the world — they can’t recreate, most likely. If you have a lot of data from that relationship, can you differentiate yourself, [by] creating your own tool, with your own fine-tuned large language model, in that space?”

## A TECH-CENTRIC MINDSET

In recent years, several law firms have contemplated how they might be able to solve some of the challenges their clients are facing with technology — and how it could strategically tie into their value proposition, according to 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.

The overall thought process, Linna says, may have been a logistical progression from law firms utilizing legal process outsourcing resources that are located in other cities or countries to help reduce costs.

“Once you start thinking that way about how you can disaggregate legal work, you can better understand the process of delivering legal work,” he says. “You then can also start seeing opportunities to develop technology that can help with the delivery of legal services.”

The cutting-edge tech efforts can stem from a relatively small group of firm members who, with the continued client pressure to deliver value, may be able to attain buy-in from leadership.

“Sometimes, [it’s] even just one innovative lawyer who saw an opportunity and was able to navigate the organizational dynamics to get the approvals to build the technology tool,” Linna says. “It’s becoming more and more commonplace, where firms are realizing the potential advantage — and in some cases, the necessity — of doing these things to be able to satisfy and retain clients.”

The outcome has involved firms introducing tech solutions ranging from items that streamline external communication, such as chatbots, to tools powered by large language models — an AI-based functionality that can be trained to comprehend and use existing content to create new content, such as a draft of a document.

Being able to leverage information from previous matters the firm has worked on within an industry or for a certain client could, according to Linna, give the organization an edge in the market.

“There’s a lot of interest in developing large language models,” he says. “If you have data that your competitors do not have, that’s something — even if your competitors were willing to spend all the money in the world — they can’t recreate, most likely. If you have a lot of data from that relationship, can you differentiate yourself [by] creating your own tool, with your own fine-tuned large language model, in that space?”

## AN INTUITIVE OUTLOOK

Global law firm Baker McKenzie began piloting the use of large machine language models in early 2022, including ChatGPT-related functionality, according to Danielle Benecke, Founder and Director of the firm’s machine learning group, BakerML.

The firm initially formed a task force in 2017, Benecke says, to examine what effect emerging technologies might have.

“The firm saw the increasing impact of machine learning and other advanced AI in legal and in other industries,” she says. “The conclusion the firm came to back then was that the technology was not likely to immediately disrupt our core business, but we expected a much more fundamental shift to begin by 2022, 2023. Back in 2017, we had said Baker McKenzie needs to prepare for a future in which the high-value service we provide will be machine learning-enabled legal judgment.”

Today, the firm utilizes commercially available software suites like Microsoft 365, which feature AI functionality, and also works with smaller legal tech start-ups to round out its stable of discovery, contract analytics and other applications.

As more commercial and open-source models have become available, Benecke says the firm has been performance testing some of the major options for various legal use cases through internal and client-facing pilots.

“The reason we are taking that approach, rather than just going ahead and deploying this thing to everyone, is there’s just so much that is unknown about the value — what kind, if any, do these models add to the work that we do?” she says.

“The key value we’re looking for there is obviously to optimize the way in which we’re doing that work to make it faster, and also to improve the quality and consistency of that work, too.”

“What are the ways in which they might be used to optimize work? Is it speed, is it efficiency? Is it improving the quality of work?”

The firm, for example, is working with practice groups within a large global technology company to test the use of generative AI — which has been referred to as the next generation of AI functionality. The pilot involves using previous knowledge the firm has generated throughout the years it has worked with the client to help create draft responses for routine queries, Benecke says.

“That technically is taking the best-performing foundation models that we identify for this particular set of needs — and then we combine that with some retrieval techniques, where we’re basically pointing the model at relevant previous advice playbooks and other firm and client know-how to create draft responses that our lawyers can review and validate,” she says. “The key value we’re looking for there is obviously to optimize the way in which we’re doing that work to make it faster, and also to improve the quality and consistency of that work, too.”

## EXPANDING SERVICE DELIVERY

At some firms, tech initiatives have been spun off into entirely new businesses — such as Gravity Stack, which Reed Smith, a law firm with 31 offices throughout the world, established as a separate entity in 2018.

Its creation, according to Managing Director Bryon Bratcher, stemmed from the firm’s realization that certain services require deep technical expertise and don’t necessarily fit into the traditional law firm model.

“Gravity Stack addresses a critical market need for specialized legal tech services and business operations consulting,” Bratcher says. “While legal experience remains essential, the complexities of today’s data-rich environment require exceptional technical capabilities for effective data management, analytics and cybersecurity. We provide a one-stop solution for clients who previously had to coordinate between multiple service providers.”

The service delivery-enhancing technology the company has created include a contract review platform, which Bratcher

says has significantly cut down the time needed for mergers and acquisitions due diligence, and proprietary data analytics tools, designed to assist legal departments with making make data-driven decisions — which automate the collection and interpretation of massive datasets to help inform litigation strategy or contract negotiation.




While Gravity Stack operates outside of the firm, Bratcher says Reed Smith ultimately benefits from its operation. “Being a separate, but affiliated, entity has allowed Reed Smith to extend its service offerings and brand itself as an innovative, full-service provider,” he says. “This has been instrumental in both attracting new clients and retaining existing ones that are seeking comprehensive solutions.”

Whether law firms are looking to create an external consulting group, like Gravity Stack, or strengthen their internal tech creation capabilities to introduce new, efficiency-producing proficiencies, Linna feels the ability to identify areas where emerging technology could have an impact on operations likely won’t flow from the top down.

“It’s going to come from creating an environment where everyone’s encouraged to innovate [and] produce greater value for clients — and people have responsible ways they can experiment with how to use those tools,” he says. “The firms that learn how to get this tool into the hands of the people who are closest to the work are going to be the ones that really innovate and make a lot of progress in both the short and the long term. They’re going to find tremendous ways to add value for the client; become more efficient; do their jobs more effectively — in a broad range of areas, from administrative tasks to complex legal tasks.”

### 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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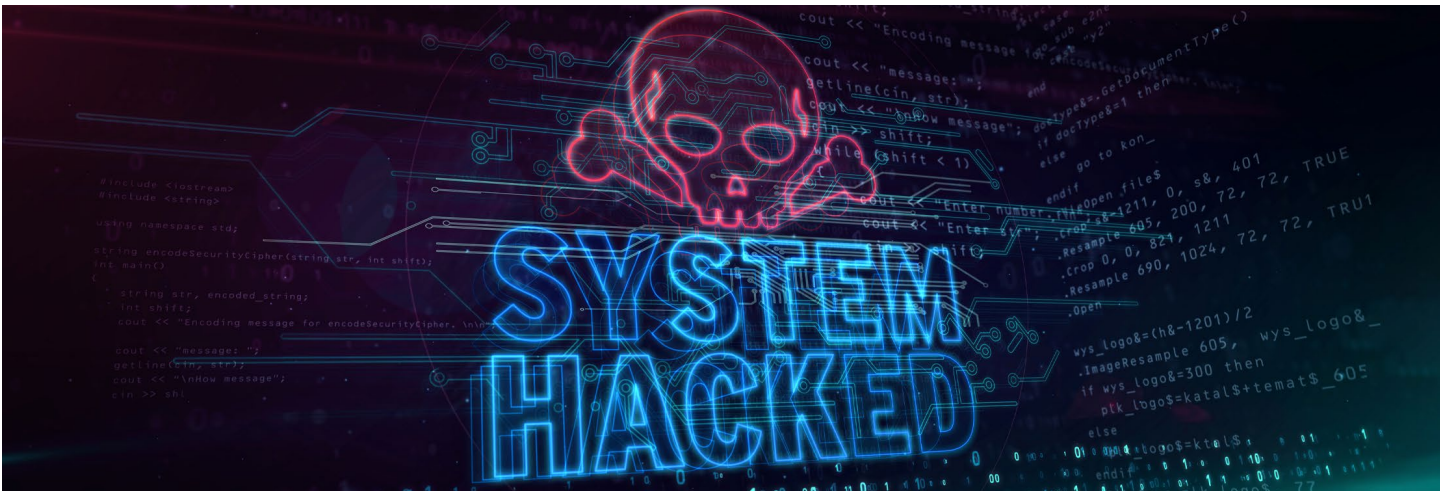
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# 6 Critical Moves to Make When a Data Hack Occurs

*As firms face increased and sophisticated cyberattacks, ensuring you know what to do in the face of an attack is paramount.*

**The stats are startling: The Hiscox 2022 Cyber Readiness Report disclosed that 48% of companies reported a cyberattack in the past 12 months, up from 43% last year. One in 5 companies attacked say their solvency was threatened, an increase of 24% from last year.**

“  
 In 2023, the average cost of a data breach reached a record high of \$4.45 million.”

The financial impacts are profound. In 2023, the average cost of a data breach reached a record high of \$4.45 million, according to IBM’s Cost of a Data Breach Report 2023. A cyberattack of even a small magnitude will have an impact on your firm’s ability to continue uninterrupted business operations.

The risk to the firm because of a breach goes beyond the loss or manipulation of client data, or the exposure of personally identifiable information. There is the potential for additional financial loss and legal penalties. Unfortunately, for many firms, it is not a matter of if, but when a data breach will occur. Even organizations maintaining well-secured IT environments become victims.

“Time is not on your side when you have a breach,” says Elvin C. Tyler, Vice President, Internal Audit & Finance Transformation at Lumentum.

Before discussing what to do when a data breach occurs, it is important to first recognize the basic differences between a data breach, data leak and a data hack.

**A data breach** is simply an incident that exposes confidential, sensitive or protected data to an unauthorized person. While data breaches can be the result of a system or human error, many data breaches are the direct result of cyberattacks, where a criminal



“As important as identifying the breach and containing further loss/exposure is, determining that the threat actor(s) have left your system is essential.”

(threat actor) gains unlawful access to sensitive information technology data (e.g., personally identifiable information, account numbers, client files, accounting records, etc.) and applications (e.g., payroll, accounts receivable, strategic planning, etc.).

Risks associated with these include:

- Weak or stolen passwords
- System vulnerabilities
- Third-party breaches
- Physical theft or loss of sensitive devices
- Physical attacks
- Old, unpatched security vulnerabilities
- Human error
- Misuse of privileged access

**A data leak** typically refers to the accidental or intentional disclosure of sensitive or confidential information from a system, application, or a database. It can occur due to various reasons, such as misconfiguration, human error or system vulnerabilities. Unlike a data breach, a data leak may not involve malicious intent or unauthorized access. It often occurs due to oversight or mistakes in handling data.

Risks associated with these include:

- Insider threats
- Unintentional disclosure
- Insecure data storage or transfer
- Misconfigured security settings (software/hardware)
- Inadequate access controls
- Vulnerabilities in third-party software

**A data hack** is the result of malicious behavior carried out by a hacker or a group of threat actors, internal or external, misusing devices like computers, smartphones, tablets and networks, which most often result in the:

- Damage, modification or corruption of computer hardware and/or systems.
- Gathering of information on users.
- Stealing of sensitive, protected data and confidential documents.
- Disruption of data-related activities (e.g., internet, critical infrastructure, etc.).

Risks associated with these include:

- Malware or ransomware attacks
- Phishing or social engineering attacks
- SQL injection code exploits
- Distributed denial-of-service (DDoS) attacks
- Man-in-the-middle attacks
- Outdated systems
- Compromised credentials

## 6 STEPS TO PROTECT YOUR DIGITAL ASSETS

Faced with the possibility that your IT environment may have been breached and your firm’s essential digital assets have been compromised, manipulated or exposed, what moves do you take to address this cyber incident and work toward mitigating future compromises to the firm’s IT environment?

### Move #1: Take immediate steps to contain the breach, collect digital evidence to identify the breach and implement longer-term procedures to mitigate the possibility of future attacks.

The first step is to identify the source and extent of the breach so that you can immediately address it, says Tyler. “If you do not have them in place, I would strongly encourage companies implement intrusion detection and/or prevention systems. These systems can automatically log the breach for you. Using the logs, you can track down the source of the breach and see which files were accessed and more importantly what actions were taken by the threat actor.”

Tyler also suggests saving an image or copy of the affected server(s) at the time of the breach as legal counsel may need it in the event of a future lawsuit.

Once the breach is contained, Amar Badrinarayan, Vice President of Technology Risk Management at Mastercard, says the first step is to assemble experts to understand the source and scope. “Then the team should quickly move towards addressing the gaps in security to stop the bleeding. This could be taking the systems that have been compromised offline to stop any additional loss, patching the vulnerabilities, and updating the credentials and passwords. As the team

“While cyber insurance provides a level of protection and contributes to reducing the risks associated with a data breach, well-designed, implemented, and tested business resiliency plans will allow the firm to continue uninterrupted, essential business operations.”

progresses through the investigation, it is very important that none of the evidence is destroyed,” Badrinarayan says.

Badrinarayan says to demonstrate that the breach has been contained, clearly describe the following:

- Source of the breach.
- Data or information that was compromised.
- Whether any of the stolen information has been used.
- Steps that were taken to mitigate the breach.
- Actions that were taken to protect affected businesses and individuals.
- A primary contact’s information for follow-up questions.

## Move #2: Perform a post-breach assessment, verifying (as much as humanly/technically possible) that the threat actor(s) have “left the system.”

As important as identifying the breach and containing further loss/exposure is, determining that the threat actor(s) have left your system is essential.

Tyler suggests the following:

**Containment:** Make sure you not only isolate the compromised systems, but also ensure you prevent destroying any evidence that can help investigate the breach.

**Eradication:** It’s vital you eliminate the cause of the breach. “For example, if the breach occurred because of the willful and intentional misconduct by one of your employees, then you should disable all accounts provisioned to that employee,” says Tyler.

**Recovery:** Getting back to normal as soon as possible is top of mind for staff. After eradication is complete, the IT team will likely install patches, have staff change passwords, etc.

## Move #3: Identify and contact those individuals who may be affected because of the breach of your IT systems.

Though it can be uncomfortable, after a breach that places the firm’s data at risk, notifications are paramount.

“Generally, anyone whose personally identifiable information or protected health information (as defined by statute) has been compromised must be notified of the incident,” says Jeffrey Schultz, Partner and Chair of the Data Innovation, Security, and Privacy Practice at Armstrong Teasdale LLP. He notes that some companies who are vendors for other companies or individuals may also have contractual obligations to notify their clients of the incident.

Schultz says most statutes and contracts will outline the timelines for notification. “Every state has a statute that requires notification of certain affected individuals if personally identifiable information (as defined in each state’s statute) has been compromised,” he says. “At the federal level, HIPAA and other sector or industry-specific laws may also impose obligations on companies to notify affected individuals in the event of a data breach. Finally, companies should be mindful of their contracts with vendors and constituents, which routinely include a variety of data security and breach notice obligations.”

## Move #4: Investigate the cost/benefits of appropriate indemnification acquiring cyber insurance.

While no organization can eliminate the risk of a data leak or a threat actor(s) penetrating, hacking or breaching the firm’s IT systems and broader IT environment, reducing that risk via nontechnical methods should always be considered as part of a firmwide risk management/mitigation plan.



According to an October 2022 memorandum from the National Association of Insurance Commissioners, approximately \$6.5 billion in cyber insurance direct written premiums were recorded in 2021, a 61% increase over the prior year.

“The need for and type of cyber-risk insurance can vary depending on the size and type of business,” says Brian Rugg, Vice President, at Think Big Go Local. “If we were limited to only one coverage type, we would choose third-party liability coverage.”

Cyber insurance is not a one-size-fits-all product. The following should be considered before purchasing a cyber insurance policy:

- Is cyber insurance truly necessary for the firm to maintain ongoing business resiliency?
- Are well-formulated, regularly tested internal controls in place that will contribute to the mitigation of cyber risk should the firm decide not to acquire cyber insurance?
- What specific risks does the cyber insurance policy address?
- Is the policy under review the right policy for the firm?
- How much risk is management willing to accept?
- Does the cyber insurance policy contribute to meeting management’s risk threshold?

### Move #5: Design, implement and regularly test business resiliency plans to assist in protecting the firm’s digital assets.

While cyber insurance provides a level of protection and contributes to reducing the risks associated with a data breach, well-designed, implemented and tested business resiliency plans will allow the firm to continue uninterrupted, essential business operations.

In brief, business resiliency plans consist of:

- Incident Management Plans
- Business Continuity Plans
- Disaster Recovery Plans

Having all three plans up-to-date and in place will provide the firm with greater flexibility, to respond to the actions of a threat actor and to assist in the timely, controlled and organized recovery from a breach.

Furthermore, Badrinarayan says revise and update your procedures for incident management and breach containment. “It is important that the lessons learned are captured for future reference.”



### Move #6: Be proactive.

Tyler says it’s best to prepare for a data breach before it happens. “Seems simple, but tragically few organizations do.” To that end, he suggests conducting a risk assessment to identify vulnerabilities within your firm. From there, you can develop mitigation plans to address any weaknesses.

John Kitchen, Global Professional Service Manager at Sumo Logic, says user training is also key. This can include “testing” employees by sending fake phishing emails to see who falls for it.

Badrinarayan echoes this sentiment. “Educate and empower your employees. Security is everybody’s responsibility in the firm,” he says.

**DON'T LET CYBERCRIMINALS DISRUPT YOUR FIRM**

As data-rich environments, law firms are prime targets for cybercriminals, making cyber insurance a critical investment. Jeremy King, Partner at Olshan Frome Wolosky and Chair of the firm’s Insurance Coverage Law Practice, walks us through what to look for when choosing or changing your cyber insurance coverage and how policies have changed to accommodate cloud servers and remote work. Give it a watch on our YouTube channel or listen here: [alanet.org/podcasts](http://alanet.org/podcasts).

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PHILLIP M. PERRY  
Freelance Business Writer

“It’s recommended that legal practitioners only use generative AI for specific, isolated, repetitive time-consuming tasks that are low in risk.”

# A Practical Guide to Generative AI

*When used responsibly, artificial intelligence remains a promising tool for enhancing the legal industry’s productivity and profitability.*

Faced with a more challenging, post-COVID-recovery business environment, law firms must achieve greater operating efficiencies than ever before. The much-heralded arrival of a new breed of generative artificial intelligence (AI) in the form of ChatGPT and similar programs would seem to be just the ticket to help everyone get more done in less time.

But will AI end up being more helpful or a hindrance? For most law firms the answer is still unknown.

“Many law firm Chief Innovation Officers have been very, very busy trying to understand and interpret how AI is going to impact their firms and to what extent it can be integrated into the practice of law,” says Joseph McSpadden, Senior Vice President–Americas at Williams Lea. “From the feedback I’ve picked up, the way AI is used is probably going to take some time to evolve.”

## SAFE BEGINNINGS

The challenge, of course, is to enjoy the productivity enhancements available from AI without allowing the new technology’s missteps to endanger the firm. Achieving that delicate balance means carefully selecting the tasks entrusted to automated systems.

“It’s recommended that legal practitioners only use generative AI for specific, isolated, repetitive time-consuming tasks that are low in risk,” says Corey Garver, head of IT services at Meritas, the global network of law firms.

“Note that the terms of ChatGPT expressly state that any content shared with their program may be reviewed and is not private. I think a lot of lawyers haven’t taken the time to consider that. We suggest that law firms do not input client, firm or personal data into the AI tool. Just stick with public information or predefined, permissible use cases within the firm.”

He suggests the following:

**Marketing and communications:** Think of how automating first drafts of things like websites, biographies and social media posts would save time. “This kind of marketing content is necessary to get thought leadership out there. But it can be time-consuming, especially for lawyers, so that makes ChatGPT very attractive and very helpful from an efficiency standpoint.”

**Legal document creation and automation:** Generative AI can be a great starting point for habitual, time-consuming tasks, such as nondisclosure and confidentiality agreements and basic contracts, notes Garver. “We are seeing a lot of tools out there for contract review that leverage generative AI to speed up the tedious process of redlining data analysis, and manually reviewing and comparing contracts.

Just remember — they can create drafts only. It’s still on staff to check the documents for accuracy.

**Discovery:** Garver says that many litigation practices have been experimenting with generative AI, noting that the automation is getting more sophisticated now. “While many firms are hesitant to use it in this area, the fact is that ChatGPT can be very helpful as a starting point for brainstorming ideas, and for drafting opening and closing statements. It can also be used for scenario planning.”

AI can also be used to help understand what might be going through the minds of a particular set of jurors. “Different parts of the country and the world have different cultures and norms,” says Garver. “As a result, sometimes it’s hard for any human to be 100% empathetic with jurors. So as a starting point for brainstorming, AI can provide insights on what jurors from a certain part of the country or region, or in this sort of economic environment, might think about a particular case.”

## DANGER ZONES

The risk of costly errors arises when law firms try to rely on AI for higher-level work. ChatGPT, for example, has proven to be way too risky for unsupervised legal research.

“A lot still needs to be uncovered regarding the dangers of AI,” says McSpadden. “You hear a lot about hallucinations, where AI fabricates information or creates false sources. Those are



obvious dangers that need to be better understood. Law firms need to be able to fence those off so they won’t be a significant issue or create significant exposure to a law firm.”

“It’s recommended that legal practitioners only use generative AI for specific, isolated, repetitive time-consuming tasks that are low in risk.”

With that in mind, Garver advises firms to be watchful for areas such as copyright laws. “When using generative AI, it’s critical to review the tool’s output, not just for accuracy, but also to ensure that there is no copyright infringement,” says Garver. “That’s a huge concern.”

He says be mindful of the American with Disabilities Act (ADA) as well. “Lawyers have a duty to avoid bias, and engaging in any conduct that discriminates on the basis of a number of different criteria,” says Garver. “As a result, lawyers must consider whether any artificial technologies they use are discriminatory or biased.”

Additionally, it might add another layer of procedure. Garver says that in the United States, some judges are requiring disclosures if AI is being used and how.

The bottom line is that human follow-up is critical when working with AI output. “Any information provided by ChatGPT must be cross-referenced with reliable sources,” says Garver.

## DRAFTING SENSIBLE POLICIES

Aware of the dangers, some law firms have decided to avoid using AI at all within matters. And some clients have directed their firms to not use it. Given the pitfalls that accompany unrestrained use of AI, it would seem prudent for any law firm to draw up a suitable usage policy.

A workable law firm AI policy is something of a moving target. Some firms are prohibiting anyone from using any artificial intelligence without approval. Garver recommends the inclusion of these guidelines:

- » **Knowledge:** Legal staff using it must have a thorough understanding of generative AI and how it works. “Solution providers can play a key role here, by educating the market on product features, trends, developments, best practices and risks,” says Garver.
- » **Disclosure:** The American Bar Association requires lawyers to discuss with their clients the means by which legal services will be provided, meaning law firms should disclose any use of AI. Garver recommends such disclosures be included in a firm’s client engagement letter before services are provided, so there are no surprises later.
- » **Security:** “Establish rules around what data can and cannot be used with generative AI,” says Garver. “Lawyers have an ethical obligation to prevent the inadvertent or unauthorized disclosure of confidential client information.”

Vendors must also be scrutinized: How do they go about protecting the law firm’s client information? And are they providing training to ensure that their technology is used in a manner that doesn’t create an unreasonable risk to client confidentiality?

Due diligence extends to the AI programs themselves. “Note that the terms of ChatGPT expressly state that any content shared with their program may be reviewed and is not private,” says Garver. “I think a lot of lawyers haven’t taken the time to consider that. We suggest that law firms do not input client, firm or personal data into the AI tool. Just stick with public information or predefined, permissible use cases within the firm.”

While the pitfalls of AI are many, the technology remains a promising tool for enhancing the legal industry’s productivity and profitability — when used responsibly. Indeed, many law firms have already been using automation for years. The new generation of AI will help them do everything much better, if they carefully plan their adoption of the technology to avoid the dangers.

“I think the road ahead is going to be very interesting,” says McSpadden. “Many of AI’s questionable areas are going to be flushed out a bit more in the next 18 to 24 months.”

**TUNE IN: A CLOSER LOOK AT GENERATIVE AI**

Check out our recent discussion on all things generative AI with Matthew Sullivan — Chief Operating Officer at Sullivan Law & Associates, Founder and Chief Executive Officer of consulting firm Unravel Legal and a member of ALA’s Professional Development Advisory Committee (PDAC). We talk about how ChatGPT and other forms of generative AI can improve efficiencies at firms as well as ways legal administrators can use this tech now. Give it a watch on our YouTube Channel or listen here: [alanet.org/podcasts](http://alanet.org/podcasts).

**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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*Administrative Director at Sullivan & Cromwell, LLP*

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*Legal Administrator, Helmers + Associates*

## Using Your Employees' Preferred Pronouns Helps Build Your Firm's Inclusivity

**If you've watched *The Crown* on Netflix, you were likely awed by Emma Corrin's portrayal of the late Princess Diana. On the heels of that performance, Corrin started a conversation about their personal journey and relationship with gender. They also updated the pronoun section of their social media page to reflect "she/they." This means that the actor is happy to be referred to as "she" or by the gender-neutral option, "they."**

“It can take time to shift the pronouns you use for someone you have known for a long time, but it's worth the effort. Practice! If you make a mistake, acknowledge it, apologize and move on.”

This is just one example of gender identity pronouns becoming an important discussion in American social, corporate, educational and political spaces. The emergence of this topic has continued to expand even more as businesses and corporations search for ways to increase employee satisfaction and retention efforts, all while ensuring that their employees feel valued and respected within their companies.

Specifically, many law firms have grown in their understanding of how to support and promote a gender-inclusive culture. Today, most firms have developed and/or implemented a plan to adopt a cohesive and understanding culture. This includes creating policies to support employees, so they feel comfortable presenting their authentic selves at work — and using the correct pronouns when addressing staff and recruits is just the start.

Nobody likes to be misnamed or misgendered. Referring to someone by an incorrect pronoun may leave a person feeling disrespected, invalidated and even dismissed. This can affect a person's mental health if they begin to feel stressed and undervalued. Business owners and their managers need to acknowledge the seriousness of using correct pronouns, as their leadership may help others to understand and value others' identities.

Still, many HR and administrative leaders have reported being confused about the appropriate usage of gender identity pronouns both in and outside of the workplace.

If this is a topic that you shy away from because you don't want to make a mistake or you simply don't understand the terms, we have provided a short summary of pronoun terms, their definitions and examples so that you can help create an inclusive environment at your law firm.

## PRONOUN ETIQUETTE

Employers should try to create opportunities for people to share their pronouns because it's best not to assume based on their outward appearance. Upon first meeting someone, it's probably best not to ask a person outright for pronouns because someone may feel like you're assuming their gender identity. In some cases, it may put someone in a situation where they must out themselves but don't want to or aren't ready. Instead, introduce yourself with your pronouns.

For example, say "Hi, I'm Kameelah and my pronouns are she/her." With this, you're allowing the other person to share their preferred pronouns if they wish to.

Email signatures are another way to call attention to chosen pronouns. For example: JaNae D. Martin (she/her). Always use someone's chosen pronouns, unless you have specifically been asked not to (for example, there might be a safety or privacy concern).

It can take time to shift the pronouns you use for someone you have known for a long time, but it's worth the effort. Practice! If you make a mistake, acknowledge it, apologize and move on. Don't hesitate to correct others gently when they misgender someone.

Please also familiarize yourself with the use of the following pronoun terms and their definitions. It's up to each individual to decide which pronoun best fits them and their identities:

- » **Feminine: She/her/hers.** Someone who might identify as female.
- » **Masculine: He/him/his.** Someone who might identify as male.
- » **He/they or she/they** (used interchangeably): In some instances, a nonbinary person may tell you they're comfortable with any pronouns or specifically with she/he/they. That means that the person uses both pronouns, and you can alternate between those when referring to them.
- » **They/them/their:** This is used as a gender-neutral pronoun.



- » **Ze, zir, zirs:** The Associated Press (AP) Stylebook notes there are a variety of proposals for gender neutral pronouns. Ze/zir/zirs comes from the transgender community as one example. (Ze is typically pronounced like the letter Z; zir is pronounced like here with a Z.) The AP Stylebook does add that this one is not yet widely used enough and depending on where you include it, it may need an explanation so as not to confuse readers.

When embarking on this journey at your office, it's enormously important to be open to continuous learning. Everyone makes mistakes, and this holds true for pronouns. On the other hand, making a mistake and then continuing to bring it up or say that it's hard to remember can make someone feel awkward and like they're a burden for having pronouns you're not familiar with. Be OK with making a mistake but also be committed to learning from it.

Additionally, remember that you should be respectful and inclusive of all employees. Although someone may not identify and use gender identity pronouns themselves, they may support a child, spouse, close family member or friend who does. The more valued, respected and included we make our employees feel, the better it is for the firm's culture and overall success.

### ABOUT THE AUTHORS

**Kameelah Hakeem, MBA**, is the Administrative Director at Sullivan & Cromwell, LLP, and serves on ALA's Diversity, Equity, Inclusion and Accessibility Committee.

**JaNae D. Martin**, is Legal Administrator at Helmers + Associates, and the 2023–2024 Vice Chair of ALA's Diversity, Equity, Inclusion and Accessibility Committee.

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AMY KOSEY

Account Manager  
Innovative Computing Systems

“Although the temptation to maintain business operations during an attack is understandable, it is crucial to prioritize stopping the attack itself. Failing to disrupt the attack first can result in revenue losses far outweighing any that might be gained by keeping employees on task.”

## Ensuring Resilience: How Firms Can Bounce Back After a Cyberattack

**It has finally happened. Despite implementing cybersecurity solutions and training employees on how to avoid phishing emails and other infiltration methods used by cybercriminals, your firm has been successfully attacked. What do you do now?**

**Here are eight steps.**

### 1. Halt the Attack First

We have seen many firms attempt to work through an attack. Although the temptation to maintain business operations during an incident is understandable, it is crucial to prioritize stopping the attack itself. Failing to disrupt the attack first can result in revenue losses far outweighing any that might be gained by keeping employees on task.

The longer an attack persists, the more data that becomes compromised, increasing the cost of remediation and likely the number of clients who will need to be contacted with unwelcome news. Firms should always have the mindset that halting the attack comes first and business continuity is secondary. Legal professionals must expect downtime after an attack.

### 2. Identify and Isolate Impacted Resources

As soon as a cyberattack is detected, it's crucial to identify the compromised resources promptly. The initial step will be to isolate these resources to prevent the attack from spreading laterally within the firm's network. Failure to segregate affected devices can lead to a more severe compromise and prolonged downtime. Law firms must have an incident response team in place to coordinate this process efficiently.

### 3. Prioritize Safety and Well-Being

While addressing cyber incidents is paramount, law firms must prioritize the safety and well-being of their personnel and clients. Establish clear communication channels to ensure employees are aware of the situation and know how to respond appropriately. This includes educating staff about potential phishing attempts and other social engineering tactics cybercriminals employ to gain unauthorized access.

### 4. Activate the Business Continuity Plan (BCP)

Law firms that have a well-structured and up-to-date business continuity plan in place will be better equipped to handle the aftermath of a cyberattack. The BCP should outline a comprehensive response plan, assigning roles and responsibilities to key personnel. This plan will act as a road map to guide the firm's actions in the event of a cyber incident, ensuring a swift and coordinated response.

### 5. Conduct a Business Impact Analysis (BIA)

A business impact analysis is a vital component of developing an effective BCP. It identifies resources and systems that are crucial to the firm's operations. Critical resources vary from firm to firm. By conducting a BIA, law firms can prioritize the restoration of these resources and streamline the recovery process, minimizing overall downtime.

### 6. Enhance Preemptive Security Measures

In the wake of a cyberattack, it becomes evident that preemptive security measures are essential for law firms. Implementing network segmentation to separate workstations and servers and further segmenting servers based on roles will reduce the attack surface and limit potential damage. Adopting the principle of least-privilege access ensures that even if a user account is compromised, the attacker cannot get to critical resources or make administrative changes.

### 7. Embrace Secure Cloud-Based Solutions

To enhance data security, law firms should consider moving sensitive data to secure cloud-based solutions. By doing so, critical information will remain protected even if an attacker breaches the firm's network. Regular backups of data stored in the cloud or in air-gapped systems are essential to facilitate recovery without paying ransoms to cybercriminals.

### 8. Test and Improve the BCP Regularly

The effectiveness of a BCP can only be realized through regular testing and improvement. Law firms should conduct tabletop exercises, simulate cyberattack scenarios and test the response



procedures outlined in the plan. These exercises will help employees familiarize themselves with the protocols, reducing the recovery time in an actual incident.

In the face of a cyberattack, law firms must be prepared to respond swiftly and effectively to safeguard their data and protect their clients. Stopping the attack and prioritizing the safety of personnel should always take precedence over business continuity. By having a well-developed BCP, identifying critical resources and implementing preemptive security measures, law firms can mitigate the impact of a cyber incident and ensure a quicker recovery, enabling them to emerge stronger and more resilient.



#### LEARN MORE ABOUT CYBERSECURITY AND THE CLOUD

Amy Kosey recently joined *Legal Management Talk* to discuss what the cloud is, why firms should transition to the cloud if they haven't already and what they need to do to prevent any cybersecurity risks. If you're looking to make the switch, she also talks about how to determine which cloud service provider is best for your firm. Tune in today! Give it a watch on our YouTube channel or listen here: [alanet.org/podcasts](http://alanet.org/podcasts).


#### ABOUT THE AUTHORS

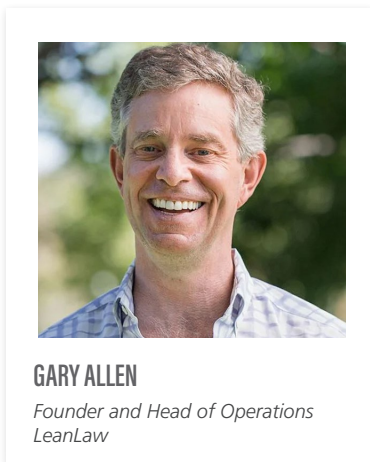
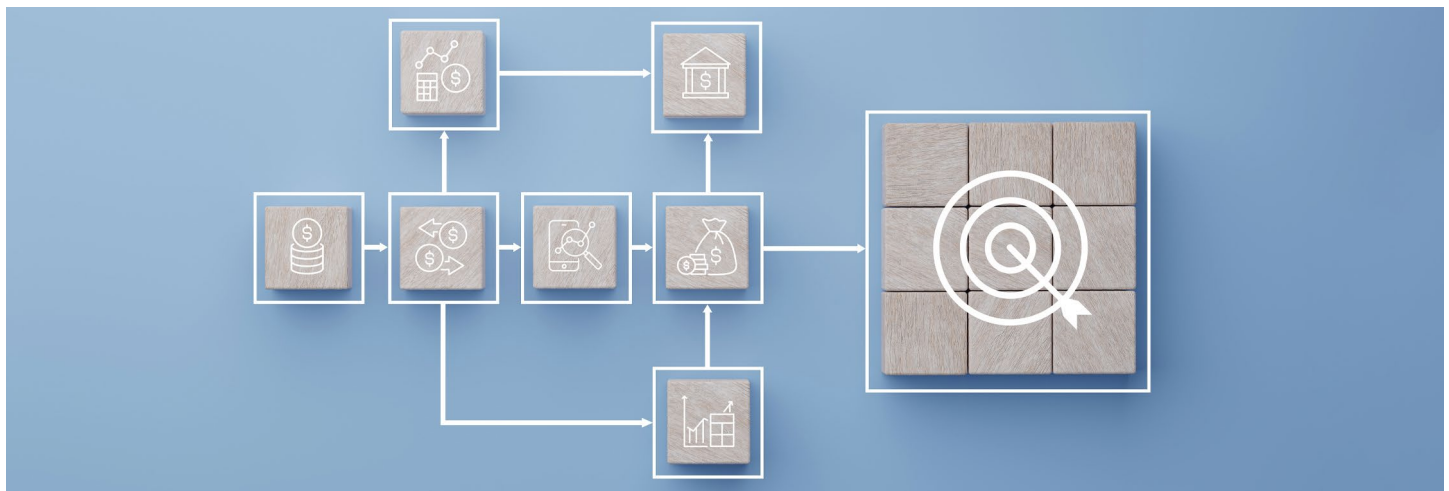
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# Unleashing Flexibility and Efficiency: The Benefits of A La Carte Software for Law Firms

**The legal tech landscape has evolved significantly since our 40-lawyer firm adopted practice management software in 2002. We hoped that this all-in-one software would offer a comprehensive solution, transforming our workflows like the automation we saw in the tech and manufacturing sectors.**

“  
 Rather than waiting for a nonexistent panacea, it’s time to strategically craft a custom tech ecosystem that aligns with your unique needs.”

However, by 2009, disillusionment had set in. The software excelled in some areas, was mediocre in others and downright deficient in the rest. Consequently, our firm resorted to multiple disconnected systems, with manual efforts bridging the gaps — a costly and unsatisfactory solution.

This experience led me to a realization: The quest for a perfect all-in-one solution was misguided. The legal tech market is too fragmented for a holistic software product to emerge. Industry giants may shy away from tailoring niche solutions for the legal sector, while smaller companies might lack the resources to comprehensively cater to all law firm needs.

However, the rise of cloud-based software provides a fresh perspective. Deliverable directly to browsers, these software solutions are always updated and accessible. They often come with open API (application programming interface), allowing seamless communication between applications.

Major platforms like Microsoft 365, Google and QuickBooks Online now offer app marketplaces teeming with integrated apps. This allows law firms to curate a suite of top-tier applications, tailored for specific tasks but interlinked for seamless workflow.

Building this tailored tech stack is no small feat. Let’s demystify the process with three transformation pillars.

## Pillar #1: Prioritize Financial Workflow

The lifeline of any law firm is its financial operations. Your tech stack must simplify everything from client engagement and conflict checks to invoicing, reporting and payments. Ensure your chosen software excels in legal-specific financial workflows such as trust accounting and compensation tracking. Your financial hub must also deeply integrate with the other foundational tools in your tech stack.

## Pillar #2: Leverage Established Platforms

Your tech foundation should stand on industry-standard software. For midsize law firms, QuickBooks Online Advanced is a top contender to pair with your legal-specific financial hub. Its accounting and invoicing features cater to midsize businesses, with hundreds of integrated apps and specialized support. Complement this with a productivity suite such as Microsoft 365 or Google Workspace. Additionally, consider integrating a customer relationship management (CRM) tool like Salesforce or HubSpot for enhanced marketing and client relations.

## Pillar #3: Integrate Niche Tools

Major platforms might not address all the unique needs of law firms. Explore specialized apps in app stores. Consider integrating QuickBooks Payroll or Gusto for payroll management or RAMP for expense tracking. If Microsoft 365 is your choice, harness its potential with

tools like Epona or consider adding a specialized document management tool like NetDocuments.

## SAY YES TO INNOVATION


While crafting an ideal tech stack sounds enticing, it can be overwhelming. Fortunately, specialized consultants can help you navigate these waters, tailoring solutions that resonate with your firm's distinct needs.

The pursuit of the perfect all-in-one software might be a relic of the past. Rather than waiting for a nonexistent panacea, it's time to strategically craft a custom tech ecosystem that aligns with your unique needs. Let's innovate, together.

### 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. In full disclosure, LeanLaw is a premier app in the QuickBooks App Store and is a Quality Service Provider for Intuit, the owner of QuickBooks Online Advanced. LeanLaw has no financial relationship with any other software or application mentioned in the article.

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# Anniversaries, Awards and Appointments

## Members on the Move »



**Jessica Dale**, a member of the San Diego Chapter, is now Accounting Manager at Devaney Pate Morris & Cameron LLP in San Diego, California.



**Michael L. DeLargy, MBA**, a member of the New York City Chapter, is now Chief Operating Officer at Schiller DuCanto & Fleck, LLP, in Chicago, Illinois.



**Viviana Llanos-Laut**, a member of the New York City Chapter, is now Office Manager at Kagan Lubic Lepper Lewis Finkelsten & Gold, LLP, in New York, New York.



**Lupe Andrea Mendoza**, a member of the Greater Los Angeles Chapter, is now Director of Operations and Human Resources Administrator at Victor Rane in Beverly Hills, California.



**Janine A. Nedd**, a member of the New York City Chapter, is now Office Administrator at Nixon Peabody, LLP, in New York, New York.



**Deborah Piker Sanders, CLM**, a member of the Silicon Valley Chapter, is now Director of Human Resources and Operations at Hoge Fenton in San Jose, California.



## Sending Our Condolences

ALA is saddened by the passing of **Jennie Brown Wyatt**, who joined ALA in 2004 and served in various leadership positions in the Middle Tennessee Chapter, including as Chapter President from 2013–2014. Jennie worked in accounting and HR at firms in Alabama and Tennessee and was an avid sports fan and writer, even writing a blog for several years. Her family requests that donations be made to the Nashville Predators Foundation. Read her obituary to learn more about Jennie. ALA sends its heartfelt condolences to Jennie’s family, friends and colleagues.

# Discover Your Online Community

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# What's Happening at Headquarters

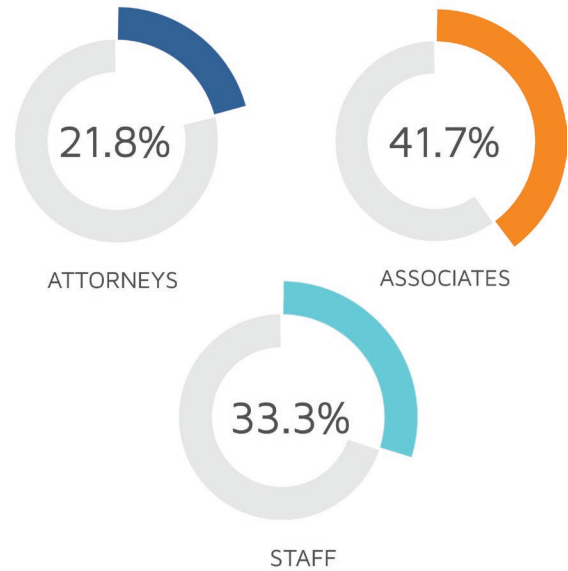
## Hiring in Legal Is Competitive. ALA Can Help.

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.

MEDIAN  
TURNOVER RATES



## From Legal Ops to Imposter Syndrome: Tune In to *Legal Management Talk*

*Legal Management Talk* offers bite-sized learning opportunities that you can listen to on the go. Most are 20 minutes or less and tackle hot topics in the legal industry.

Go to [alanet.org/podcast](http://alanet.org/podcast) to watch every episode and stay informed. Plus, be sure to subscribe to ALA's YouTube channel so you know every time a new episode drops! Here are some of our latest:

- » Can AI Make Your Firm More Efficient? with Hamid Kohan
- » Don't Let Cybercriminals Disrupt Your Firm with Jeremy King
- » A Peek Around the Corner with PDAC: Imposter Syndrome in Legal (and Life)
- » Understanding Legal Ops with Tom Stephenson

## Battling Burnout in the Legal Industry

Intense workloads, added responsibilities and requirements, long workdays, and continual stress. It's an all-too-common scenario in the legal industry — and it's a recipe for burnout. It's more than just a feeling; burnout can take a toll on your mental, emotional, and physical health and start to affect your life outside of work, too. If this sounds familiar, plan to attend our next Roundtable — on October 20 at noon Central — with colleagues who empathize. Catherine Alman MacDonagh, JD, and Joseph A. Samarco, MBA, ALPP, of ALA's Professional Development Advisory Committee, will offer ideas for battling burnout and start an open and honest discussion on an issue that's widespread within the legal community. Go to [alanet.org/networking/roundtables](http://alanet.org/networking/roundtables) to register for FREE!

## ALA Celebrates National Disability Employment Awareness Month

October is National Disability Employment Awareness Month, when we celebrate the important contributions Americans with disabilities make to the workforce. This year's theme is "Advancing Access and Equity." According to the Centers for Disease Control and Prevention, only 22.5% of people with a disability participate in the workforce compared to nearly 68% of those without.

This month, we recognize the significant progress that has been made in advancing equity and inclusion nationwide while still acknowledging the work that remains. ALA is committed to helping you create an inclusive environment at your firm so everyone receives an equal employment opportunity. Go to [alanet.org/resources/diversity](http://alanet.org/resources/diversity) for more information on National Disability Employment Awareness Month and how to commemorate it at your office



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