

LEGAL MANAGEMENT

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Destination: Office

For a hybrid office situation to work, people need to want to come back to the office. Here's how some firms are successfully luring them back.





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“
 What I have found is
 volunteering can help
 you to find and connect
 to things that are truly
 important to you and
 bring a greater level
 of satisfaction to your
 everyday hustle and
 bustle.”

There Is No “I” in Team, but There Is a “U” in Volunteer!

Volunteering has always been a part of my life. I cannot think of a time in my career when I was not giving of my time and talents in the pursuit of helping others or participating in something to impact the change I wanted to see. From drafting wills for first responders pro bono to mentoring law students to serving on the ALA Board of Directors, I truly believe you get so much more than you give when you volunteer. More importantly, it just makes you feel good, and we all need a little more of that in our lives right now.

I can hear you all as you read this listing all the different reasons why you do not have the time to volunteer. We are all working and experiencing change at a faster pace than ever before. There are more demands being placed on all of us to do more with less. Also, it is harder and harder to strike the right balance between important yet competing priorities. However, there is no greater priority than yourself and your total well-being. What I have found is volunteering can help you to find and connect to things that are truly important to you and bring a greater level of satisfaction to your everyday hustle and bustle.

Here are the top five reasons why I volunteer:

1. Happiness Factor

Volunteering has been proven to not only increase happiness but also boost your self-esteem. It has exposed me to so many fun activities, given me opportunities to travel to new places and brought many new professional connections and personal friends into my network whom I would not have met otherwise.

2. Investment in Yourself

Warren Buffet said: “The best investment you can make is in yourself.” Volunteering allows you the opportunity to learn and develop new and valuable skills through actual hands-on

experience. This is especially true if you go beyond participating and agree to lead some aspect of your volunteer experience.

3. Increased Sense of Purpose

Volunteering allows you to have an impact on something bigger than yourself and your own career. My mentoring relationships have been some of the most valuable professional learning opportunities for me. Also, there is a huge sense of pride when you look back and see the benefits of something you helped create that outlives your tenure.

4. Growth Mindset

Author Adam Grant recently posted this on LinkedIn: "The highest form of self-confidence is believing in your ability to learn."

Volunteering has helped to get me doing more things outside my comfort zone. Allowing myself the opportunity to volunteer and try something new and fail has been an important part of my leadership journey. As a result, I am more comfortable raising my hand for those stretch opportunities because I have proven my capacity to learn new things and figure it out along the way.

5. Improved Perspective and Empathy


Volunteering has helped me better understand the experiences and perspectives of others. So many times, we approach issues from only our own experiences. Learning how to connect and understand others helps us to be better leaders and more empathetic which has shown to increase innovation, engagement, retention and inclusivity.

So if you want to be happier, healthier and have an increased sense of purpose, **VOLUNTEER!** If you do not know where to start, check out these sites to help connect you to unlimited opportunities in your community: volunteermatch.org, catchafire.org, idealist.org. Last, but certainly not least, visit the ALA Volunteer Opportunities page, where you will find a variety of opportunities that vary in time commitment and activity level.

If you are new to ALA, do not wait to share your perspective as your voice is critical to our current work and our future success. We need your time, talents, skills and experiences to help ALA continue to be the undisputed leader for the business of law.



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ALEX KELLY

Chief Operating Officer
Brightflag

“To allocate legal resources more strategically, general counsels can lean further into legal operations teams — whether expanding them or creating them — to drive greater automation, stricter cost control and smarter data analysis.”

How Legal Ops Is Redefining the Role of the Legal Team

The onset of COVID-19 accelerated the pace of change for corporate legal departments, requiring many to work more efficiently and with an increased focus on cost control. Expect the pace to only accelerate as the legal operations movement steps into the spotlight.

A legal ops team helps legal departments run more efficiently and make better decisions. What it also does — through improved processes, technologies and data-driven insights — is help set strategy that yields maximum value to the organization. A legal ops team leveraging legal operations software can help a legal department flip the resourcing pyramid, where rather than outside firms handling the bulk of the work, legal teams can handle more matters and tasks in-house and reserve outsourcing for only the most specialized requests.

According to 38% of respondents to the Association of Corporate Counsel's 2021 survey of chief legal officers, legal operations is related to their most strategic initiative. To allocate legal resources more strategically, general counsels can lean further into legal operations teams — whether expanding them or creating them — to drive greater automation, stricter cost control and smarter data analysis. Existing legal ops teams that expand can become invaluable members of the legal leadership team, not only executing the general counsel's vision but also helping to define strategy. Legal teams hiring their first legal ops professional can quickly understand how these professionals can become the pillar upon which they can build modern legal service delivery.

LEGAL TECHNOLOGY FREES UP TIME

Three key factors in emerging technology help a legal ops team move the legal department forward:

- **Modern cloud-based tools:** A legal technology solution with a cloud-based, central system of record makes staying aligned easier among members of the legal team, other stakeholders in the organization and outside counsel who are globally distributed and, in many cases, working remotely. Rather than files, documents, invoices and other matters being sent back and forth over email, each party has a shared pathway, eliminating the hassle of tracking down critical information. This advantage boosts collaboration and efficiency. According to 70% of in-house legal leaders polled in Bloomberg Law's 2021 Legal Operations survey, improving attorney efficiency is a primary consideration when deciding which legal ops practices to implement. Closely behind were the ability to reduce costs (69%) and the ability to improve attorney workflows (61%).
- **Artificial intelligence (AI):** An AI solution helps free attorneys from time spent on repetitive-but-necessary tasks such as reviewing invoices and contract clauses and gives them more time to spend on more strategic initiatives. It also can automate invoice intake, recognize text and classify text into appropriate tasks and activities, such as automatically paying or rejecting invoices or flagging other invoices for additional review.
- **Analytics:** AI solutions can surface granular data points from invoice reviews, yielding a new level of transparency and insight into legal spending. These analytics can help guide decision-making on whether to handle certain matters in-house or externally, how to price the work, how to split time between partners and associates, and myriad other considerations. Such data-driven insights help corporate legal departments determine how well the work of outside counsel aligns with the in-house legal team's expectations. The analytics also can reveal which outside firms provide the most value in fulfilling the company's business needs.

LEGAL OPS ELEVATE THE ROLE OF THE LEGAL TEAM

As noted earlier, a team leveraging legal operations software with AI and automation gives attorneys more time to spend on high-level thinking versus mundane tasks. But a legal ops team can also become an agent for change within the legal department itself. It can help move the legal team's mindset from absolute risk avoidance to strategic risk awareness. Legal teams focus too much on avoiding risk rather than recognizing that risk is inevitable and working to minimize it. The best a legal department can do is gain visibility into that risk, quantify it, analyze it and make strategic decisions going forward.

Legal ops help move the legal department from being a stalwart for stability into a champion for change. There's a difference between a legal department that accepts digital transformation and a legal department that initiates it. These legal professionals can be the engine for innovation that helps drive momentum. Through data-driven insights into legal spending, streamlining matter management and saving valuable attorney time and resources, legal ops can take a seat beside the general counsel and help drive strategic decision-making.

ABOUT THE AUTHOR

Alex Kelly is the Chief Operating Officer and Co-Founder of Brightflag, an AI-powered legal operations platform. Prior to founding Brightflag, Kelly advised financial institutions and global enterprises as a corporate lawyer within a large international law firm. Kelly is responsible for growing and enabling every corner of the Brightflag team.

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“Until law firms identify, recognize and address the ... barriers to employee well-being, wellness programs will struggle to gain traction and produce mediocre results. As law firm administrators, we help shape the culture of our firms.”

We Are Not OK: The Syndemic Impacting Legal Community Well-Being

Law firms throughout the country have created wellness and well-being programs in their offices to address ongoing concerns about lawyer and legal professional mental health challenges. The COVID-19 pandemic exacerbated these challenges, often disproportionately by gender, race, family status, economic status and even geographic location.





More than two years into the pandemic, additional stressors are being heaped onto attorneys and staff that may go unnoticed in a (still) male, White-dominant profession. If these stressors are unacknowledged by well-being programs, we can expect limited progress in employee mental wellness.

THE FACTORS CONTRIBUTING TO THE “SYNDEMIC”

Numerous studies and articles have delved into the ways the pandemic affected women, particularly those in caregiving roles. We’ve also seen substantial attention paid to how COVID-19 affected people and communities of color. These topics are, to be sure, important and often take center stage on many news broadcasts and website splash pages, dissecting the effects of a changing work environment on well-being.

Less acknowledged are everyday negative stressors that uniquely affect those not in the dominant center of American society and the legal community. The *Journal of the American Medical Association* describes the interplay of these stressors and their effects as syndemic theory: “...synergistically related, clustered epidemics that arise from harmful social conditions.” Evidence abounds on LinkedIn, where posts frequently start with sentences such as, “We are not OK;” “Your Black friends are not OK;” “Your LGBTQIA+ colleagues are not OK;” or “Check in on your Asian American and Pacific Islander (AAPI) coworkers.”


Here are some reasons why:





-  **Model minority myth:** Certain ethnic groups are often painted as ideal employees who can handle stress better than others. This can have the negative effect of dissuading attorneys and staff from seeking the mental help they need to prioritize their well-being.
-  **Racial battle fatigue:** Those who are on the receiving end of microaggressions (and macroaggressions) carry stress that others don't. Many colleagues face distressing racist experiences caused by people, policies and systems. The cumulative effect can be exhausting and is called racial battle fatigue. Constant fatigue also contributes to physical health issues. Being aware that coworkers could be dealing with this fatigue is a step in the right direction.
-  **Headlines:** Similar to racial battle fatigue, the constant onslaught of news and social media headlines and videos describing or even showing injustices — and the ensuing outrage — can take a toll on our mental health, which in turn affects work performance.
-  **Health disparities:** Although law firms and legal organizations are required to offer the same health care coverage to all employees, taking advantage of the benefits may look different for various groups. Some employees may have difficulty taking time off to address their health needs. Others may face pressure from their families, religions or ethnic groups to downplay or ignore health issues and needs. Some may have little to no support. With the rise in remote working options, many more employees live in areas where access to quality health care is difficult or nonexistent. Even telehealth options present technological hurdles.

HOW TO TAKE ACTION TO PROMOTE THE WELL-BEING OF ALL EMPLOYEES

Until law firms identify, recognize and address the above and similar barriers to employee well-being, wellness programs will struggle to gain traction and produce mediocre results. As law firm administrators, we help shape the culture of our firms.

Here are a few steps we can take to reduce barriers to workplace well-being for everyone:

-  **Embrace existing well-being programs:** Fully participate, encourage colleagues to do the same and support those charged with creating the programs.

-  **Model best practices:** It's one thing to talk the talk and another entirely to walk the walk. Practice mindfulness, take the time you need to address both physical and mental health concerns and let coworkers know that they are also encouraged to take care of themselves.
-  **Pay attention:** If you notice a coworker struggling, offer support in the way that they need it. Learn about holding space for people and provide them with a safe environment.
-  **Increase awareness:** Learn about the factors and issues that affect your colleagues. Conversely, educate them on the ones with which you struggle. Sometimes that means having a conversation, and sometimes that means purposely refraining from having a conversation if it would retraumatize or further fatigue the person.
-  **Talk to leadership:** It's easy to get bogged down in the day-to-day operation of a law firm, no matter the size. Let your law firm leaders know that well-being is a priority and share what's working and what isn't working in existing wellness programs. Alert them to areas that need attention and provide suggestions.

Well-being isn't something we achieve overnight, nor is it a fixed goal that, once reached, we can put on a shelf and walk away. Employee well-being is a constantly evolving practice that requires thoughtful consideration and constant reevaluation. Neither is well-being solely the responsibility of an employer. Rather, we are all partners in moving the legal community toward a healthier place for the sake of the industry, our clients and all our colleagues.

ABOUT THE AUTHOR

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Content Marketing Manager
Rapid Legal

“
Law firms can use data
to save money and lower
certain types of risk, so
when you consider taking
on any technology solution,
you’ll want to ask questions
about the data it provides.”

Tech Tips to Operate More Efficiently

The pandemic and changing industry dynamics are forcing law firms to innovate their way onto solid footing. In other words, the time is now for law firms to explore and leverage the full capabilities of legal technologies to remain competitive.

However, before technology can optimally serve a law firm’s needs, the firm must think strategically to capitalize on the operational advantages and data insights technology can offer in support of the organization’s business strategies and objectives.

These measures help make that happen.

THINK STRATEGICALLY

A law firm’s strategic thinking should define and challenge its underlying core assumptions and ardently seek to uncover blind spots. It should also assess the organization’s readiness by asking:

- Who are all the stakeholders?
- What are you trying to achieve? What are your goals, objectives and criteria?
- How will you decide what to invest in, and is a budget available?
- If other departments are impacted, are they willing to change? Is there cross-organizational support and executive sponsorship?
- What does the organization and staff need to support the rollout and ensure success?
- What is the plan and its timing?

Some needs can be uncovered by looking at a firm’s vision, strategies and plans, including needs related to client matters, business processes and practice areas. Getting a handle on the full scope of needs requires input from everyone.

WHEN YOU DON'T KNOW WHAT YOU DON'T KNOW, ASK SOMEONE ELSE

Taking on a new technology is not unlike taking on a new employee. Just as human resources has a model for onboarding new hires, law firms should have a model for acquiring and deploying new technologies. Each model uses specific questions to reveal strengths and weaknesses.

In a law firm, this vetting process should gather individuals from across the organization who possess multidisciplinary expertise to “depose” the legal technology and legal technology vendor.

Why does this approach work? It's simple. Let's look at e-filing and service of process through the eyes of finance and accounting professionals. In doing so, you gain insights squarely related to the technology's finance-specific features or even if not a finance solution, it may impact cost-related outcomes for the business.

In the case of data provided by a litigation support service provider, the finance and accounting staff members may unveil a system integration between the provider and the firm that can automate reconciliation and allocation of payments to clients. On their recommendation, this process becomes part of the business model which, in turn, makes the firm more efficient.

One Los Angeles-area law firm used this exact approach to streamline its accounting and save the equivalent cost of one full-time employee.

A critical key in using this technology strategically was the daily transfer of order and payment details from the customer relationship management (CRM) system used by the firm's litigation support service provider directly to the law firm's CRM.

The success was owed to involving multiple stakeholders in the planning who understood the law firm's needs, recognized an opportunity for technology to satisfy those needs and turned to technology that met their requirements.

WHEN IT COMES TO DATA, THINK DIFFERENTLY AND THINK OFTEN

Law firms can use data to save money and lower certain types of risk, so when you consider taking on any technology solution, you'll want to ask questions about the data it provides.



For example, data about the performance of common litigation support services such as court filing, e-filing and service of process can help gauge the performance of business partners and help firms operate more efficiently and cost-effectively.

This is where a litigation support service provider can help. They can collect these types of data and provide it to law firms in regular reports. For example, a firm can use the data in the litigation support service provider's e-filing reports to evaluate turnaround times and rejection rates.

Similar data can be pulled from a litigation support service provider to measure service of process performance. This data enables a firm to track service level distribution, orders by type and service of process orders by pricing zone. It's important for a firm's business model to use these data sets as cost control measures.

The firm may also use the reports to gauge the vendor's performance or the law firm's own internal performance.

ONWARD AND UPWARD

Technology on its own is just an enablement, but under the guidance of a well-structured business model and involving key firm stakeholders, technology can take you to the moon and back. And, in many cases, the fuel for that trip will be data that helps you continually learn from technology and plot the course forward.

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ERIN BRERETON

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Where Firms Are Falling Short on Business Continuity

Is your firm prepared for sudden employee departures, natural disasters and other unforeseen circumstances?

In 2007, shortly after being jolted awake at 4 a.m. by a phone call, Michael Morse found himself standing in front of the office building that housed his law firm — which was on fire and burning down.

The gravity of the situation wasn't lost on Morse.

"I had client calls that were going to be coming in the next few hours," he says. "I had lawyers who had to be in court. Most people would have been out of commission for weeks, if not months. But because we had a written-down playbook, we were up and running within a few hours. We didn't miss a beat."

While the COVID-19 pandemic has undoubtedly highlighted the need to be prepared for sudden challenges, less than half of law firms — 41% — said they had a disaster recovery or business continuity plan in place in a 2019 American Bar Association survey.

A number of the firms that do have merged the two plans into one comprehensive approach to unexpected events, according to Sharon Nelson, an attorney and President of Sensei Enterprises, which provides managed IT support and cybersecurity services to law firms.

"More often, we've seen a single unified incident response plan, and it covers both disasters and cyberattacks," Nelson says. "It's more hybrid now than it used to be."

Whether your firm eventually faces a fire, a partner becoming seriously ill or other major event, having a plan in place that clearly outlines what to do — and who will do it — can position your organization to react promptly and effectively.

“It could be any type of calamity. It could be a fire, your biggest referral source saying, ‘I’m not sending you any more cases,’ the death of a partner. A business continuity plan is just being prepared. I’m not trying to downplay the heartache and the tears I had watching my building burn, but I was organized and ready.”

"The first seven days are usually the worst because on top of having to secure business continuity, you have to secure life continuity. You're still a parent, a spouse, a child of somebody who will need your assistance during that turbulent time."

If your firm hasn't created a plan to address continuity challenges yet — or may need to revisit and revise the one it's using — you may want to consider including some of the following elements.

DESIGNATED ROLES

Morse, Founder of the Michigan-based Mike Morse Law Firm, now coaches firms on operational practices and has co-written a book on the topic, *Fireproof: A Five-Step Model to Take Your Law Firm from Unpredictable to Wildly Profitable*. Morse notes the book is named "Fireproof" partially because it addresses preparing for misfortune. He says his firm was able to bounce back so quickly because it had put processes in place to address any major occurrences.

On the morning of the fire, by 8 a.m., firm members were answering calls in the parking lot and accessing files on their laptops. In the following days, individual employees tackled various tasks — somebody found new office space; another person dealt with server-related needs; a separate employee addressed the phone system.

"It could be any type of calamity," Morse says. "It could be a fire, your biggest referral source saying, 'I'm not sending you any more cases,' the death of a partner. A business continuity plan is just being prepared. I'm not trying to downplay the heartache and the tears I had watching my building burn, but I was organized and ready."

Delegating responsibilities — ranging from who will head up a hiring committee to who will regularly come into the office when it's closed to pick up the mail — can help save time and confusion when it's time to enact the response plan.

Nelson advises listing position titles as being responsible for specific tasks in the plan, though, instead of employee names.

"People come and go," she says. "You want to identify the position, as opposed to the person."

Renata Castro, Founder of Castro Legal Group, an immigration law firm with 38 employees, has designated a repository attorney to facilitate information being shared and prevent continuity gaps if she ever becomes ill.

Castro is also a proponent of preparing team members to step in for each other if necessary.

"You always want to cross-train people because if someone, God forbid, gets sick, gives notice, moves across the state — that happens," she says. "You want to be quick on your feet on making that transition because your clients are going to be really sensitive, anxious, concerned — and you want to be able to address it."

COMMUNICATION PROCEDURES

Your firm's approach to sharing critical news and updates internally and externally will likely vary somewhat, based on the circumstances. However, a provision to address how those decisions will be made can be built into a response plan.

"Do you tell your employees about any of this?" Nelson says. "What if it spreads? Then you've got real reputational damage, which is why some people actually keep a PR person [listed] on the incident response plan."

You'll also need to confirm ahead of time that the firm has a way to disseminate information to the correct parties. While firms should have an up-to-date employee contact information list, instituting a client communication process can also be helpful.

Castro's firm uses a messaging system to distribute important news to clients after events such as a hurricane.

"We can text clients in a certain area," she says. "That's the importance of collecting data on your clients. It really is about making sure every time you connect with a client, you validate their information — is this still your mailing address? Is this still your email address? Is this still your phone number?"

INSURANCE CONSIDERATIONS

Law firms may want to look into business continuity insurance, which can potentially help offset the revenue an employee would have generated until the person is able to return or be replaced. That said, it won't provide absolute protection, says James Chittenden, the Founder of business consulting service OneClickAdvisor.com, who worked with Castro to create her firm's continuity plan.

"If you have a key person who is sick and remains sick, that's actually insurable," Chittenden says. "But you want to have redundancy. You don't want to have everything pinned on one person. [If] I've got all this important knowledge [and] get hit by a car, where does that leave the business? Insurance is just one small part of the planning."

Along with specifications to contact any professionals you'll need to work with — such as a data breach lawyer and digital forensics specialist after a cyber incident — plans should include any moves your cyber insurance policy requires you to make after a breach, according to Nelson.

For example, to be covered, a firm may need to file a formal claim, in addition to notifying its insurer.

"There are so many steps you have to take in any incident response plan," Nelson says. "The plan has to contain all of the laws relative to a data breach or ethics in a disaster. For instance, if it's a data breach, you've got to have the data breach notification law for your state."

Your insurance company and a data breach attorney can provide guidance on how to handle informing clients about an incident. Although if their data has been compromised, Nelson says, in a ransomware or other attack, there's no question they need to be told.

"That's within the rules of all of the states," she says. "You've got to put them in the best possible position and make sure they know that their data's been exposed or taken. That doesn't mean you have to make it public, but if you don't pay the ransom, the bad guys have the client [contact information] — and they're going to tell the clients they have your data. So you better have gotten there first."

METHODS TO KEEP THE PLAN CURRENT

Once you've got a solid response plan in place, testing its feasibility is also important.

"You have to practice incident response plans," Nelson says. "Most firms do tabletop exercises. You pretend that not only did you have a data breach, but the electric grid went down, and how does that impact everything? What do you do when the lights all go out?"

Frequency is also crucial. Firms need to look at their plan at least once a year, according to Nelson.

Now may be a good time. Given the pandemic's effect on how law firms and other businesses operate, reviewing your



response processes can be beneficial, Sensei's Vice President John Simek says. "The conditions have changed quite a bit. Should there be a problem with the electric distribution, what is your comfort factor? Do you think that you need to have potential facilities 20 miles away that might not be impacted, or is 2 [miles] good enough? Do you plan to rent or have on retainer data center space that has backup generators and offices where you can very quickly temporarily set up shop? Those are all things that should be part of your plan," says Simek.

With revisions — or if you're penning a new plan — preparing for the worst-case scenario can help ensure the response to whatever your firm encounters will be thorough, Castro says.

"Continuity is just making sure you have all your ducks in a row," she says. "The first seven days are usually the worst because on top of having to secure business continuity, you have to secure life continuity. You're still a parent, a spouse, a child of somebody who will need your assistance during that turbulent time. The last thing you want to be thinking of is, 'Who will answer the phones now that we cannot get to the office?' Just having basic steps in place helps a great deal."

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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VALERIE A. DANNER
Senior Managing Editor
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Administrators

“We had to reevaluate what the modern office space should look like in the aftermath of COVID. Having an inclusive and modern office space that reflects our company's ethos is crucial.”

Destination: Office

For a hybrid office situation to work, people need to want to come back to the office. Here's how some firms are successfully luring them back.

On one side: It's work from home or bust. They enjoy flexibility, forgoing a commute so they can get more work done in the time they'd otherwise be spending in transit and having more time for a personal life after they clock out. They've proven they are just as productive — if not more so — at home and enjoy a more balanced work-life combination.

On the other: It's at the office every day as it largely was before March 2020. They believe that while much can be accomplished at home with technology and a webcam, there are things that lend themselves better to being present with colleagues in an office where idea generation and mentoring can occur more readily. They want to be able to pop by a colleague's desk and get answers without having to type out their thoughts in a chat.

The compromise: hybrid work options. And it seems to be the option that the working world is migrating toward. A Gallup poll from March 2022 found that 53% of respondents expect a hybrid arrangement. Meanwhile, 24% expect to work exclusively remotely. Firms that aren't embracing a more flexible work arrangement stand a high probability of not being able to recruit the talent they need.

One thing is clear — the workplace is different than it was three years ago. Technology and a generation entering the workforce that has never known a world without Wi-Fi translate into a need to reimagine what it means to “go to the office.” But it can be a tough sell. To make hybrid work possible means giving people a reason to come back to an office. Working from home does its own sales pitch — the flexibility, jammy pants and other comforts of home. So what can firms do to entice people back to the office to make the hybrid model successful? From natural light and green spaces, here are what some legal organizations are focusing on.

“The benefit of [a] physical office is the socialized collaboration to build culture with your firm and with other employees. Our workplace team says the best amenity in the office is your coworker.”

1. MAKE IT AN INVITING SPACE FOR EMPLOYEES

Making the office a destination is consistently top of mind for firms, according to Asher Inman, Associate in Tenant Advisory and Transaction Services at CBRE’s Washington, D.C. office. “It’s been an interesting few years during the pandemic to see how firms are adjusting. Law firms have been constantly [asking for] ways to magnetize the office when it comes to build-outs and design because many firms haven’t required attendance. It’s been more of a soft policy to be there three days a week,” says Inman.

As firms shift to a more concrete hybrid option, Inman says firms are looking for options that promote quality of office life. “If you’re going to bring people back, they’re going to want to be in an office that promotes health, promotes wellness, it promotes social interaction, that promotes mentorship,” says Inman.

Ball Janik, LLP, has a hybrid/flexible policy that enables their employees to efficiently accomplish their work regardless of location, while also creating positive work/life balance, says Heather Oden, the firm’s Chief Operating Officer and a member of the Oregon Chapter. A key part of this was a redesign of their office to make it a place people enjoyed coming to (see the cover).

“We had to reevaluate what the modern office space should look like in the aftermath of COVID. Having an inclusive and modern office space that reflects our company’s ethos is crucial. We created more spaces for collaboration and gathering, and the office feels ... well, kinda cool! The warm textures combined with bright colors make it a place people want to be in,” says Oden. “Change is difficult, especially in the legal industry, and our goal with this redesign was to plant a flag in the ground showcasing what a legal firm’s workspace can look like in the modern world.”

2. ASK YOUR EMPLOYEES WHAT THEY WANT

Understanding what employees want and need in a workspace is also an important step that shouldn’t be overlooked. At Reich & Binstock, LLP in Houston, where Kimberly Friery is Controller, she’s overseeing a construction buildout that was designed with a hybrid environment in mind. In order to understand what staff are looking for when it comes to office space, she started with a survey.



“I first put out a survey using SurveyMonkey, of how they felt about remote work, how well their setup at home works, if they need anything, what days they prefer to come in to the office, if they enjoy coming to the office and why,” says Friery, an Independent member. She adds that they also focused on specific work environments. “All paralegals now have an office, but with the remodel, I am condensing the space and giving everyone a 5-by-5 cubicle with an electric desk that they can also stand at,” says Friery.

One general sticking point for attorneys at some firms is they want or need their support staff around them. This can be solved with a schedule. Friery says she used results from this survey to devise a schedule according to dockets for when each support staff member must come into the office. All other days they can work from home.

Oden notes that Ball Janik also surveyed employees and put a detailed schedule in place for the working arrangements. “We have to meticulously plan our hybrid work schedules based on client and team needs. We’ve dramatically expanded our technology toolset over the last several years to improve workflow and collaboration no matter where someone is working from,” says Oden.

“It would have been unthought of just a few years ago, but landlords or building owners are looking to carve out space that could be used as rentable square footage and turning that into outdoor terraces.”

3. INVEST IN TECH, GREEN SPACE AND WELLNESS

Speaking of expanding tech, for a hybrid option to securely work, there must be an investment in tech.

Inman says this is a request they consistently get, too. “The leading thing firms are focused on [is] accommodations and meeting spaces for people who are physically present in the office and those who aren’t. They’re really thinking deeply about interacting in this digital realm so that you feel like you’re still sitting across the table from your colleague rather than just a little box on the screen,” says Inman.

Oden says while incorporating modern tech into their new office to help keep them working efficiently was a priority, the design itself was part of the draw. “More than anything else, we want this space to draw in talent and make everyone feel welcome and a part of the BJLLP family.”

It goes to the heart of the argument for in-office time: Even the best videoconferencing systems can’t replicate the happenstance of interactions with colleagues that occur in collaborative, community spaces.

“The benefit of [a] physical office is the socialized collaboration to build culture with your firm and with other employees. Our workplace team says the best amenity in the office is your coworker,” Inman says. “So, firms have doubled down on their investment in areas meant for social interaction that you can’t have when you’re working remotely. Firms have been very thoughtful about incorporating amenity areas like elevated cafés, coffee stations or lounge areas, and these [play a role in] magnetizing the office and people wanting to come to the office and feel attracted to that social interaction in a great new space with natural light,” he says.

Friery says she looked for ways to let light in with their buildout at Reich & Binstock. She put a lot of glass in the attorneys’ offices so that it opens the space and “makes everyone in a cubicle feel like they have windows.”

With an eye toward well-being, natural light and access to the outdoors are recurring design themes. “Green space and outdoor space [are] in very high demand,” says Inman. It would have been unthought of just a few years ago, but he says landlords or building owners are looking to carve out space that could be used as rentable square footage and turning that into outdoor terraces.

“A great example of this is a client of ours moved from a lower quality building to a trophy quality building, and it had a great outdoor terrace on the rooftop. [That] space is gorgeous and bright. It received tons of natural light. It has café features throughout the space and an interconnecting stairwell so you can see people as they move throughout the workplace,” says Inman.

There’s an outdoor area at Faraci Lange’s new space, too. Katrina L. Connelly, the firm’s Chief Operating Officer and a member of the Western New York Chapter, oversaw their office move earlier this year. Connelly says the new office includes an outdoor area where they have furniture for staff. The hope is staff will gather there for lunches and other social events.

4. SMALLER FOOTPRINT — BIG IMPACT

Even before the pandemic, firms were starting to examine ways to make their footprints healthier and more cost-effective, says Inman. But like many things, the pandemic accelerated it.

“We were already seeing law firms adjusting secretarial ratios, finding new uses for the library space they didn’t necessarily need — coupled with intentional downsizing and hybrid, remote work environments in mind,” says Inman.

At Faraci Lange, Connelly says they cut their space in half when they moved because of the hybrid arrangements since 2020. They needed less storage space and fewer large offices and conference rooms, as now they often meet with clients via Zoom.



With that, there needed to be a shift in workspaces. She says they've implemented hoteling spaces for those who only come in a few days per week. They've also said that if employees want a dedicated spot in the office, they need to come in three days a week. Want an office with a window? They need to come in five days a week.

Connelly is happy to report that staff have responded well to the changes and are thrilled with the efficiency of the new space. "We have been lucky to have a wonderful staff that works hard and, for the most part, everyone has chosen an arrangement that works best both for them and the firm," says Connelly.

It's been positive at Ball Janik, too. "Our team loves the new space, and in fact, our employees and industry partners located in different parts of the country joke that they also want a place here! Morale has always been positive at our firm, but we felt it was important to be proactive in redefining our office space for how we operate now and plan to in the future. We're confident that, as we grow, our office will remain a place where everyone feels included and inspired."



TUNE IN FOR MORE DESIGN DETAILS

In a new episode of *Legal Management Talk*, Heather Oden of Ball Janik LLP and Amalia Mohr of LRS Architects discuss Ball Janik's recent decision to redesign their office space to adapt to a hybrid-work world and promote their employees' health and wellness. Listen (and watch!) Mohr and Oden describe how the elements they incorporated into the design — such as a lot of wood and glass — have impacted the firm. Visit alanet.org/podcast.

ABOUT THE AUTHOR

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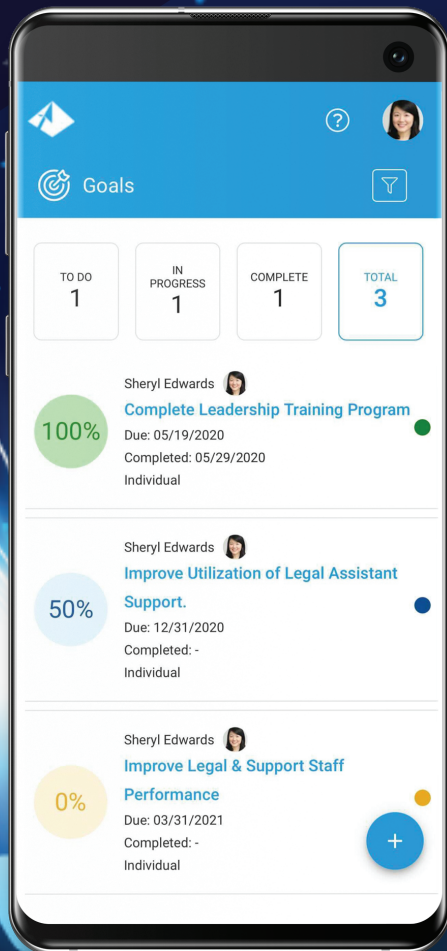
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“Having one place to go for the end-to-end service, with one fee agreement and one primary point of contact for all of their needs is a huge plus for [clients]. They receive a coordinated effort that is efficient, effective and at a lower cost than under the traditional legal business model.”

Legal Ownership Gets Innovative

As more states follow Utah and Arizona, career opportunities for legal professionals grow.

Legal is not known for its innovation, but attorney Nicole Auerbach is an exception to that notion. She left a Chicago firm after about 15 years to establish a new firm, Valorem Law Group, designed to bring alternative fee arrangements to the marketplace. At the time, this was a new and disruptive practice in the legal industry. As innovators in the profession, Auerbach and one of her partners often had the opportunity to interact with other innovative companies, including alternative legal service providers or “law companies,” such as Elevate Services, Inc.

After a decade of successfully running Valorem, they were particularly interested in the fact that Elevate, a global law company, did “everything legal” for companies and other law firms other than practice law in the traditional sense. They knew that the market was evolving and that in-house law departments were looking for services like consulting, legal operations and e-discovery, but they also knew that being able to handle the practice of law for those same customers would create an end-to-end solution. That’s when they decided to join forces with Elevate.

At that time, in 2018, there were no states that were allowing outside ownership for a law firm, so they formed a traditional law firm in Illinois under the standard rules of ethics. They would then pitch clients together with Elevate and provide services alongside one another. But when Arizona and some other states started talking about alternative business structures (ABS), they seized the opportunity to provide clients with a one-stop shop for all issues that impact law departments and their attorneys.

It became a natural fit for Elevate to obtain a license in Arizona for its law firm called ElevateNext. The Arizona ABS directory shows that ElevateNext is 100% owned by Elevate Services, Inc. (Elevate also owns an ABS firm in the United Kingdom.)

“For skilled functional specialists, paralegals or talented business-savvy executives, there are now new opportunities to share in the profits of the practice of law, while being recognized by these ABS entities for the value that they bring to the table.”

Ultimately, this helps those in need of legal services. “[From my perspective,] the client benefits the most because the majority of what a client needs for routine work in the current structure requires the client to use multiple sources,” says Auerbach.

“Having one place to go for the end-to-end service, with one fee agreement and one primary point of contact for all of their needs is a huge plus for them. They receive a coordinated effort that is efficient, effective and at a lower cost than under the traditional legal business model.”

Remember, ElevateNext is a law firm operating as an ABS, owned by Elevate. The focus is on routine, run-the-company matters that require lawyers in the mix, but also the other services that Elevate provides. The firm currently focuses on providing litigation services such as handling subpoena responses and portfolios of litigation, privacy matters, compliance matters, negotiation and contract review, as well as corporate formation and related corporate work. Elevate brings technology for efficiency; designs and executes workflows and processes for repeat matters; creates large, global teams for managed services that can be done at scale; and has the geographic scope that allows the ABS to provide services at lower cost than traditional law firms, as well as around-the-clock resources.

They found the process of getting the ABS license took time, effort and a lot of documentation, but otherwise went smoothly. Having some of their lawyers join the Arizona Bar was a process. Character and Fitness portions of the ABS application are similar to the disclosure process for becoming an attorney.

NEW LEGAL PATHWAYS

Auerbach’s path is one that is becoming more accessible as more states see the successes such structures can offer, especially in bridging the gap for legal access. In July of this year, the Oregon Supreme Court also jumped on board by granting final approval to a licensed paralegal program that the Oregon State Bar had been developing since 2017.

In a field that can lack innovation, there are now new and innovative career opportunities for those legal professionals who don’t practice law.

Let’s look specifically at Arizona. The Arizona Supreme Court began licensing the ABS in January 2021, opening the door for legal professionals who do not practice law to invest in law firms and profit-sharing within firms.

An ABS is nothing more than a law firm that has much more flexibility in ownership and investment income so long as it follows the regulations set forth in ACJA 7-209. Various business models are already emerging in Arizona.

For example, Donna Owen is a licensed paraprofessional who works at Udall Shumway in Mesa, Arizona. As an Arizona legal paraprofessional, she is licensed to represent clients in family law cases with the limitations outlined in ACJA § 7-210.

This new licensing procedure now allows licensed paraprofessionals in Arizona to provide legal services in limited practice areas much in the same way as a physician’s assistant is licensed to provide medical services to patients. Licensure is currently available in the areas of “family law,” “limited jurisdiction civil law” and “criminal law.” Plans are underway to include “administrative law” in the future. The use of the title “legal paraprofessional” comes with many qualifying requirements as outlined in ACJA § 7-210.

Another example is if an estate planning law firm wanted to partner with a CPA firm, they have numerous ways to structure their newly formed ABS:

- The CPA firm could purchase the law firm and operate it as a wholly owned subsidiary of the CPA firm. The lawyers in the subsidiary might have 0% ownership in the business while continuing to operate independently to provide legal services. The CPA owners would likely absorb the accounting functions of the firm, payroll and other administrative departments, such as human resources, IT, marketing, etc.
- The CPA firm and the law firm could merge, and each retain a percentage of ownership. They would again likely restructure the merged firm for efficiency and growth, maximizing the strengths each brings to the new firm. Any percentage of the ABS could be assigned to prior owners of each business and, if desired, highly talented

legal professionals (beyond practicing lawyers) who were integral to the success of the new company could also be assigned a percentage of ownership both as a reward for their work and as an enticement to remain with the newly structured firm.

- The CPA firm could bring in a group of investors to partner with them on the purchase of the law firm. The current owners of the firm could use this purchase as a succession plan and leave the practice. The new ABS would retain some or all remaining lawyers, and likely, immediately begin hiring additional lawyers. Again, there could be a restructuring of the business keeping the most talented and valuable personnel.

That begs the obvious question, according to Lynda Shely, Founder of The Shely Firm, PC and participant in the drafting of these regulations in Arizona: “What happens to the practice of law in these ABS law firms, especially if there are no lawyer owners? [The regulations state that the Arizona] compliance lawyer must be at least an employee or a manager of the ABS and a member in good standing of the State Bar of Arizona. They must possess experience in the legal field to ensure that the ethical obligations, protection of the public and standards of professionalism are adhered to,” she says.

This standard of conduct is regulated by the licensing process and if an attorney is unduly influenced as to how they practice law or if anyone other than an attorney is practicing law or interfering with the lawyer’s independent professional judgment in representing a client, the ABS license would be in jeopardy.

“While it is not required by the code, the compliance attorney may need some contractual authority in the ABS or be an owner of the ABS because an employee of a firm may not have sufficient authority within the entity to enforce the policies and procedures required under the rules,” Shely says.

As of publication, 22 companies are currently an ABS in Arizona. They operate in the practice areas of estate planning, tax services, online flat fee transactional services, personal injury, worker’s compensation and mass tort cases, business law, intellectual property, veteran’s rights and sexual abuse and immigration law. These companies may be headquartered outside of Arizona or even in countries outside the United States — but the compliance attorney for every registered ABS is an Arizona attorney, thus assuring entity composition of at least one attorney.

Again, ownership of the ABS may be completely by legal professionals not practicing law — so long as a compliance

attorney is identified and only lawyers provide the legal services. Applications for ABS status require that any owner of 10% or more of an ABS entity must be disclosed. Lesser shareholders may not need to disclose ownership, depending on the circumstances of ownership. For instance, one Arizona ABS called eLegacy Law, LLC, is an Idaho company that is owned 90% by attorneys and 10% by a marketing executive (who is not a lawyer). On their website they advertise “estate planning with flat rate pricing using actual attorneys from the comfort of your home.”

I DON’T LIVE IN THESE STATES — WHY DOES IT MATTER?

If you work in the legal industry and do not live in Utah or Arizona, why should you care about this change in legal services?

For starters, other states in the United States are looking into codifying ABS or Multidisciplinary Practice (MDP) entities. Using Utah and Arizona as a reference, any state that already has a licensure process in place for paralegals, court reporters or other legal professionals who don’t practice law could, in a relatively short period of time, conceivably create a model for ABS or MDP licensure in their state. Fees for licensure and renewals of these licenses may soon become another source of revenue for them as well as for their state bar associations.

In Arizona, a portion of the registration fee is reserved for the Arizona State Bar. Registration fees range from \$2,000 for Arizona nonprofits to \$12,000 for an internationally based ABS. Annual renewals are currently set at one-half the registration fee. Once the application is in process, other fees may apply for investigation(s), mergers and acquisitions of the ABS, disciplinary procedures and reinstatement.



For skilled functional specialists, paralegals or talented business-savvy executives, there are now new opportunities to share in the profits of the practice of law, while being recognized by these ABS entities for the value that they bring to the table. This value might also come in the form of private investment into an already existing law firm that might benefit from an infusion of cash in return for a share of ownership.

Also, ethical considerations may arise if your firm engages in business with another firm that doesn't have traditional lawyers. Sharing of fees should be carefully considered, and contracts should be clear as to how the fees are earned and shared.

Just as good employees do not always make good managers, in today's world, it may be true that good lawyers may not always be the best law firm owners. In some cases, they and their firms would better thrive if ownership of the firm is shared with others — employees, investors or other businesses, to name a few. No matter who the owners are, excellent leadership and proficient

management are key to high-quality, ethical performance and the business success of any law firm.

These developments can make legal access more of a reality for many, while also opening up new opportunities in legal, particularly for ALA members.

"This is a really exciting time to be practicing law. We have had a phenomenal reaction from customers," says Auerbach. "I applaud Arizona for taking the steps they have taken, and I look forward to further developments in legal reform from other states in the future."

ABOUT THE AUTHOR

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The graphic features a series of icons at the top: a gavel, gears, a bar chart, a speech bubble, and a group of people, connected by a line. Below these is a large blue curved banner with the text "REGISTER NOW" in white. The main title "LEGAL MANAGEMENT FUNDAMENTALS" is in large blue letters, followed by the subtitle "Navigating Your First Five Years" in black. The dates "November 4-5, 2022" and location "Kimpton Hotel Born | Denver, Colorado" are listed. At the bottom left is the hashtag "#ALALMF22" and the website "alanet.org/LMF". At the bottom center is the ALA logo (Association of Legal Administrators). At the bottom right is a QR code and the registration code "B00-690-694AX10".

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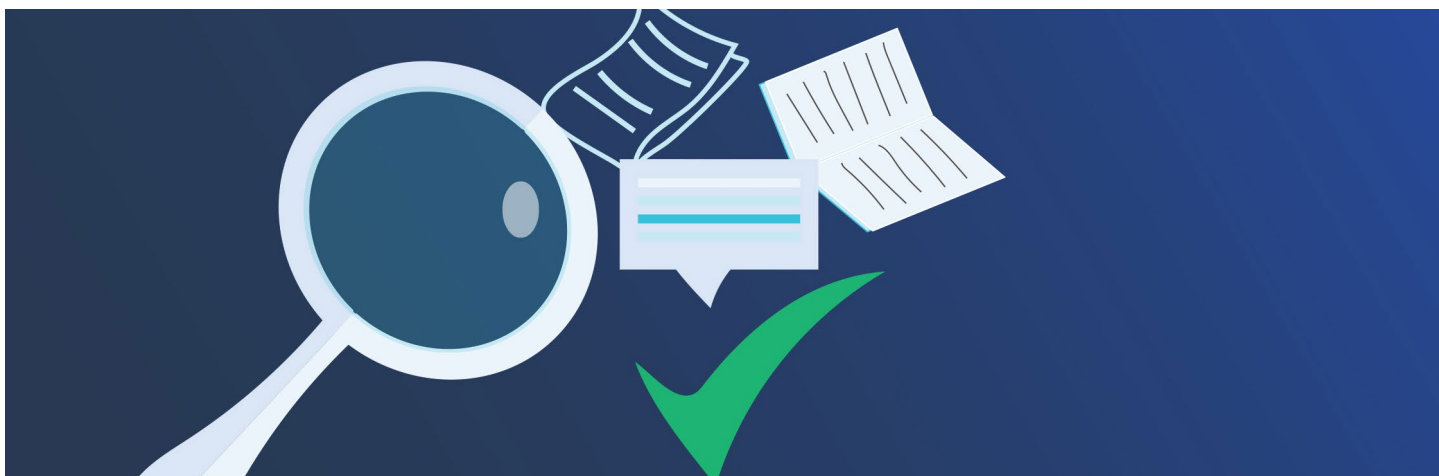
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ROSS FISHMAN, JD
Chief Executive Officer
Fishman Marketing

“When you have tangible evidence to support your message, highlight it. Don’t make visitors work to figure out why they should hire you. Showcase the facts, early and often.”

In Marketing, When You Have the Facts, Use Them

Hollow puffery is easy. Marketing with evidence is effective.

I think the best way to illustrate this is with an example. Howard Law Group (HLG) is a national business and civil litigation firm that handles large bet-the-company lawsuits. That alone isn’t effective for marketing — but founder Bill Howard’s trial record is. He hasn’t lost a trial in over a decade, losing only four times in his 30-year career. He has a reputation for being tough in court — and his clients love that about him. Partner Jean Treece Howard is a master storyteller and excellent trial lawyer as well.

This is what makes them special and gives them their winning track record. This is what their marketing needs to be built around.

And yet, their old website didn’t elevate these details; in fact, it was profoundly unremarkable. The main illustration was two skylines with the suggestion that clients will receive “experience, talent, sophistication, accessibility, personal attention [and] practical solutions.”

Those are all the broad and meaningless promises every nothing-special law firm makes. When we embarked on a rebrand, we followed a few simple rules.

Rule No. 1: When you claim everything, you own nothing.

Howard Law Group’s description on their old website was so broad and unspecific that it meant nothing. Potential clients had no idea what HLG stood for.

HLG deserved better. They truly were different, but they hadn’t been using it in their marketing. Their website was flat and lifeless — they needed something that was true to their style.



Rule No. 2: Identify your differentiator.

So what should their message have been? We landed on: "When you can't afford to lose, or simply don't want to, call HLG. We're tough. We win."

Bill Howard looks physically intimidating, which supports the firm's "tough trial lawyers" message. We leveraged his powerful appearance with gritty, nontraditional photography.

Rule No. 3: When you have the facts, use them.

It's so important: When you have tangible evidence to support your message, highlight it. Don't make visitors work to figure out why they should hire you. Showcase the facts, early and often. Bill Howard's trial record is 300-4. Lead with that fact: "For starters, we've handled hundreds of significant trials over the past decade. That's hundreds. And we've won 98% of them. Yeah, those few losses grate on us."

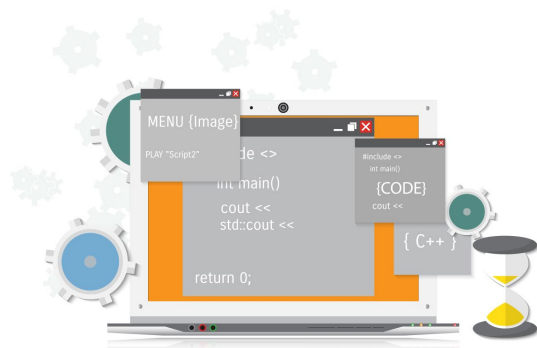
Additionally, the firm's FindLaw website had failed to convey the firm's stylistic or technical differentiators — they looked like just a typical little small-town Western Michigan firm, i.e., "From Wall Street to Main Street."

Let's see this in action by contrasting their before and after:

BEFORE:



AFTER:



So — which of these homepages grabbed your attention? Which one looks different? More importantly, if you needed help defending a scary, bet-the-company case, which of these two firms do you feel would protect you better? Which conveys a greater sense of skill and quality?

Further, small firms typically have limited awareness. We wanted to use the "how" in Howard as a hook, to connect the marketing to their firm name and help increase name recognition. We designed a new logo as well. See the emphasis on "how" in the after campaign.

We knew we could prove our point using real stories, so we built a marketing campaign around real examples and their astonishing but objectively verifiable win-loss record.

The HLG lawyers are actually very nice, fun and friendly, with a good sense of humor. But that's not why clients come to them. HLG lawyers get hired because they win.

We added case studies of a few recent victories on the homepage below the fold. The makeover is pretty powerful, and it accurately reflects the dynamic culture of the firm — what you get if you hire a lawyer from the Howard Law Group.


If you're looking for a gentler approach, the firm might not resonate with you. And that's fine with HLG. You're probably not a good fit with them either.

But if you're looking for a strong, aggressive defender, this type of marketing helps you understand precisely what you can expect from the Howard Law Group.

So find what makes your firm special, preferably something that can be backed up with stats and facts. Then use that to show your clients why they should hire your firm for business.

ABOUT THE AUTHOR

Ross Fishman, JD, specializes in branding, websites and marketing training for law firms. A former litigator, marketing director and marketing partner, he has helped hundreds of firms dominate their markets. Fishman was the first inductee into the Legal Marketing Association's "Hall of Fame." He's written two books on branding and associate marketing both available on Amazon.

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**BILL & PHIL**

William Ramsey, Partner,
Neal & Harwell

Phil Hampton, Consulting President,
LogicForce

We've Got Gadgets to Squeeze the Most Out of Summer

We may be on the tail-end of summer, but it's our favorite time of year. We make time to push away from the computer and get outdoors to enjoy the summer sunshine. But just because we leave our PCs and laptops behind does not mean we forsake all tech as we venture out on summer break. We have found some of the best summer tech gadgets to take with us and enhance our immersion back into nature.

Here are some of the favorite tech gadgets we found this summer:

“Just because we leave our PCs and laptops behind does not mean we forsake all tech as we venture out on summer break.”

Bose SoundLink Flex Bluetooth Speaker: No summer trip is complete without our vacation playlist — playing those tunes in the mountains or on the beach doesn't have to sacrifice audio quality. The SoundLink Flex by Bose is the latest in a long line of Bluetooth speakers that we keep on the ready for travel, regardless of season. It's extremely durable (“rugged” is the way Bose describes it) and is both dust and waterproof. Of course, Bose speakers have some of the best audio that we have found, and the SoundLink Flex is no exception. With a 12-hour battery life, this speaker will last probably longer than we will on a hot, summer excursion.

GasBuddy App: Yes, we noticed fuel prices were a wee bit elevated this summer. Even as prices start to dip, we still rely on the free mobile app, GasBuddy. This app operates sort of like Waze, but instead of crowdsourcing traffic conditions, it crowdsources gas prices. As users report gas prices at various stations along your route, the app will show you all the stations in your vicinity and what their gas prices are. This one is a no-brainer, especially on a long road trip.

Nimble CHAMP Portable Charger: If you're like us and like to get far away from the office during summer break, you're not always going to be close to electricity to charge up all your gadgets. That is why we always pack our Nimble CHAMP. This

ultra-compact charger, which weighs only 6.4 ounces, packs a powerful punch. The 10,000 mAh battery stores up to three days of power and is capable of fast-charging both Apple and Samsung gear.

MECO Solar Flashlight: If you're out camping, you will probably want to pack the MECO solar flashlight. This emergency flashlight has a solar rechargeable battery that also can be hand-cranked if the battery drains and you're in the dark. Cranking for six minutes gives an hour of light. This essential gadget is tiny and light (less than a quarter pound).

NEBULA Anker Capsule: If you love planning a staycation in the warmer months, you might want to get the NEBULA Anker Capsule, a smart Wi-Fi mini projector that lets you have a movie night in the backyard. This compact projector has a 360-degree speaker and projects a 100-lumen image up to 100 inches anywhere you want to place it. The NEBULA runs Android natively and allows you to stream content directly from apps such as Netflix and YouTube.

Ontel Arctic Air Pure Chill 2.0, Evaporative Air-Cooler: This is not an air conditioner — it's an air cooler. But it works. You just pour water into the tank on top and plug it in. It will give you cool (not icy cold) air for 10 hours on one filling. It's small enough to put on your desk or on the kitchen countertop. It also works great inside a tent, if you have power.

Magic Chef MCIM22/HNIM27 portable ice maker: This small portable ice maker has a reservoir that holds water for your ice. It makes about 27 pounds of ice in 24 hours. It's very portable, and you can carry it with you to a party and fill your

adult beverage glasses with ice. It holds about a pound-and-a-half of ice in its storage bin and it tells you when the bin is full. Drink away!

Cuisinart Cool Creations Ice Cream Maker: Bill and Phil love ice cream. In fact, we make sure to eat some every day, regardless of the season — ice cream, gelato, frozen yogurt, sorbet. We don't care, as long as it is cold and sweet. With Cool Creations, you don't need to crank and get all sweaty. You just put the bin in the freezer, put the mix in after it freezes and you get about 2 quarts of ice cream in 20 minutes. And it comes with a recipe book filled with our favorite frozen concoctions.

Wise Owl Outfitters DoubleOwl Hammock: Bill likes to sleep, and what could be better than to hang your hammock under the stars for a cool night's sleep? Setup of the hammock is a breeze and it holds up to 500 pounds (which Bill needs after eating all that ice cream). And the Wise Owl is highly portable. It only weighs 24 ounces and folds up to the size of a Black Beauty eggplant.

Summer's official days may be waning for 2022, but that doesn't mean the fun has to stop. We hope these products help you get the most out of the season while you can!

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*.

 twitter.com/BillandPhil





MIKE HENDERSON, WHITNEY JONES,
& BILL PITCAIRN

CoreTech

Leasing and Financing Can Work to Your Advantage in an Inflationary Economy

Everyone has their eyes on the state of the economy. With the inflation rate reaching 8.52% in July and pandemic-related slowdowns continuing to affect the supply chain, people are feeling the squeeze just as they're looking to resume their pre-COVID lives.

Law firms are no exception. Many organizations are competing for a limited number of services, which drives prices up even further. In fact, overhead expenses — such as support staff compensation, knowledge management and library services — have all grown at modest rates, while technology spending is up by 8% — one of the fastest growths the Law Firm Financial Index (LFFI) has tracked since 2014.

Fortunately, there is a way to counter some of those spending increases — leasing and financing.

LOCKING IN RATES AS COSTS INCREASE

As the Federal Reserve increases borrowing rates to combat inflation, leasing the equipment your business needs may make more sense than ever.

Primarily, leasing means fixed — not adjustable — monthly payments, converting a firm's equipment and project costs into an affordable monthly expense. As rates increase, leasing and financing lock an organization into lower rates, saving the firm money over time. Leasing allows the firm the flexibility to reset and order required technology and equipment, providing time for the supply chain strain to ease.

“As rates increase, leasing and financing lock an organization into lower rates, saving the firm money over time. Leasing allows the firm the flexibility to reset and order required technology and equipment, providing time for the supply chain strain to ease.”

Leasing means no down payment, leaving more cash available to move to better-performing investment options that should follow the Federal Reserve rate increases. Leasing also requires smaller, fixed monthly payments to help guard your cash flow if your money borrowed with a variable rate of interest becomes more costly. Material residuals invested into laptops and other hardware also help to decrease the cost of equipment that has a limited lifespan.

INCREASE YOUR OPTIONS AND PURCHASING POWER

Banks are in the process of cutting back some of their lines of credit as a response to the economy. Some firms may be in for a surprise, but an independent lessor may have access to a variety of bank funding types and can use those choices to create the best financial solution that aligns with the firm's business objectives.

Inflation reduces purchasing power over time. A key selling point of financing is that it affords clients the opportunity to pay for equipment in future dollars using current interest rates, whose value would be reduced by the effects of inflation, creating an effective hedge against inflation.

Equipment leases follow fixed monthly payments (in dollar amounts or in percentages), shielding law firms from currency fluctuations and market inflation.

MATCH PAYMENTS TO USEFUL LIFE

Leasing and financing help ensure the firm has the right technology for the right amount of time and can be customized to match payments to its useful life. Technology is now mission critical to your firm's efficient and productive delivery of legal services. With these positive changes in the use of technology come certain challenges:

- » Law firms are faced with increasing pressures from both corporate and private clients when it comes to cybersecurity and proof of an asset management system or strategy.
- » Decreasing the useful life of the technology and equipment the firms have come to rely on to compete, adapt and succeed means refreshing the fleet more often, which can be operationally challenging.

As part of the solution, your firm should put together a workable disposition plan combined with a technology refresh mechanism that will protect the firm from keeping outdated equipment in use that doesn't adhere to new and increasingly high-security standards. A refresh cycle — tailored to the firm's needs — streamlines operations and keeps the firm on a fixed monthly payment while ensuring attorneys' devices are up to date.

GET A HIGHER TAX DEDUCTION

With owned equipment, firms are allowed to deduct depreciation and interest expenses from their taxable income, but not the principal payments. With a capital lease, firms can deduct the entire lease payment as an expense, which will allow firms to write off expenses quicker. This shorter period means a larger deduction each year, lowering your taxable income and decreasing your taxes. It's good to note that for 2022:

- » The deduction limit for Section 179 is \$1,080,000 in 2022 — up from \$1,050,000 in 2021.
- » The 2022 Section 179 deduction threshold for total amount of equipment that can be purchased is \$2,700,000.

ASSET MANAGEMENT IMPROVES SECURITY AND CUTS IT COSTS

Leasing goes hand in hand with security protocol number one: always know where your assets are. Clients and insurance companies are upping their game when it comes to auditing their law firms' security protocols. Firms must do everything that is required to keep their systems secure and facilitate auditing processes. But sometimes asset management can be overlooked. For example, when a firm states to its clients or insurance company that it is secure, the location of all the firms' devices may not be known or stand up to the scrutiny of an audit.



Leasing and financing come with asset management that further enhance a firm's security efforts and increase personal responsibility over issued devices to protect the firm and its clients, all while reducing costs.

With modern asset management, IT knows in real time the location and chain of ownership tied to any piece of equipment. Finance can manage all contract expirations and lease language from a single place, putting them in an optimal position to proactively manage terms and conditions, reduce costs and benefit from converting most of their IT budgets into a fixed monthly expense.

While this is a picture of the economy now, the only thing we know with certainty is that things will continue to change as we meet the challenges laid before us. Ensuring the firm has financial and operational flexibility, a continuously up-to-date technology fleet to improve security and mobile asset management to manage it all are the tools needed to compete successfully moving forward — and leasing is the financial strategy that will help you get there.

ABOUT THE AUTHOR

Mike Henderson is the Regional Manager at CoreTech. He brings over two decades of knowledge capital and dedicated experience in the high-tech corporate leasing industry.

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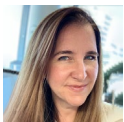
Dora Alcala, a member of the Arizona Chapter, is now Paralegal at Jones Skelton & Hochuli, PLC, in Phoenix, Arizona.



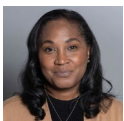
Mallory Beverly, CLM, a member of the Raleigh/Durham Chapter, is now Director of Operations at Bagchi Law, PLLC, in Chapel Hill, North Carolina.



Kenneth Crooks, a member of the Southwest Florida Chapter, is now Chief Operating Officer at Gerber Ciano Kelly Brady LLP in Buffalo, New York.



Lisa Marcum, a member of the Central Florida Chapter, is now Chief Operating Officer at Newsome Melton in Orlando, Florida.



Lisa Moore, a member of the Philadelphia Chapter, is now Human Resources Director at Maron Marvel Bradley Anderson & Tardy, LLC, in Wilmington, Delaware.



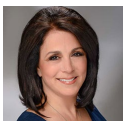
Ariana Palermo (not pictured), an independent member, is now Office Manager at Nyhan Bambrick Kinzie & Lowry, PC, in Chicago, Illinois.



Scott Popp, an independent member, is now Executive Director at Cunningham Meyer & Vedrine, PC, in Chicago, Illinois.



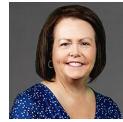
Kim Robinson, a member of the Greater Los Angeles Chapter, is now Director of Human Resources and Administration for Liebert Cassidy Whitmore in Los Angeles, California.



Gina Sanfilippo, PHR, a member of the Arizona Chapter, is now Senior Director of Office Administration at Snell & Wilmer LLP in Phoenix, Arizona.



Melody Watson, a member of the Capital Chapter, is now Firm Administrator at Klein Hornig, LLP, in Washington, D.C.



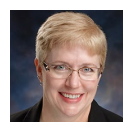
Paula Andrews, a member of the Atlanta Chapter, is now Chief Operating Officer at Clark Partington in Pensacola, Florida.



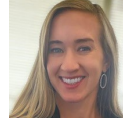
Leslie Bobb (not pictured), a member of the Chicago Chapter, is now Office Manager at Proskauer in Chicago, Illinois.



Joe Kelley, an independent member, is now Chief Operating Officer at Wilson Elser Moskowitz Edelman & Dicker, LLP, in White Plains, New York.



Kathleen Miller, CLM, a member of the Suncoast Chapter, is now Director of Administration at Icard Merrill Cullis Timm Furen & Ginsburg, PA, in Sarasota, Florida.



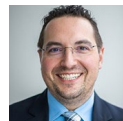
Jamie Nichols, a member of the Arizona Chapter, is now Office Manager at Stinson LLP in Phoenix, Arizona.



Julie Paul, a member of the First State Chapter, is now Chief Human Resources Officer at Armstrong Teasdale, LLP, in Philadelphia, Pennsylvania.



Diane Raithel, a member of the Golden Gate Chapter, is now Office Administrator at Akin Gump Strauss Hauer & Feld, LLP, in San Francisco, California.



Joe Samarco, MBA, ALPP, a member of the Philadelphia Chapter, is now Director of Revenue Operations at Hogan Lovells US LLP in Philadelphia, Pennsylvania.



Amanda Spiller (not pictured), a member of the Mile High Chapter, is now Practice Support Manager at Davis, Graham & Stubbs, LLP, in Denver, Colorado.



Jane West, CLM, SHRM-SCP, SPHR, a member of the Dallas Chapter, is now Office Manager at Vedder Price, PC, in Dallas, Texas.



Sending Our Condolences

ALA is saddened by the passing of **Nicole Dyson** after a five-year battle with lung cancer. Nicole worked closely with ALA headquarters on behalf of Gallagher Affinity and our VIP partner UPS. We send our condolences to Nicole's family and friends.





ALA also sadly received word that **Sally Miller** suddenly passed away in August. She was a member of the Arizona Chapter and a former member of the Tucson Chapter when it existed. We send our condolences to her siblings, children, grandchildren and friends.

ALA also regrets the passing of **Brenda Homan**. She was an active member of the Dallas Chapter — serving as Chapter President and on various ALA committees — until becoming sick in 2019. We send our condolences to her family and friends. Donations can be made in her memory to Operation Kindness or any no-kill animal shelter.

Discover Your Online Community

The member-exclusive Online Community allows you to connect with legal management professionals from around the world. You can also source opinions and solutions from members who have dealt with the same challenges, including within special shared interest groups.

ALA's new Online Community platform offers a user-friendly social media interface with tons of special features:

-  Video meeting capability within groups for presentations and discussions
-  Direct messaging to link up with a particular member, even if they're not currently active
-  Polling capability that groups can use to identify best practices, rate the popularity of ideas and collect other data
-  Content tags that help you follow certain topics and even receive alerts about new activity in your inbox



community.alanet.org

What's Happening at Headquarters



HAPPY Retirement!
Renee

ALA wishes a happy retirement to our HR Director, Renee Tibbets. Renee joined ALA in 1999 and helped lead staff through many changes over the years. ALA is a better organization because of her service. She'll be sorely missed, but we wish her well on her next adventure!



Sign Up for This Fall's Mental Health First Aid Program

Our popular Mental Health First Aid Certification Program is back! The program is an interactive training course comprised of 2 hours of self-paced content (to be completed online independently prior to the live session) and one 6.5-hour instructor-led session over Zoom. The one-day training program will be offered on four separate Fridays in late October and early November. Due to the interactive nature of this course, there is a maximum of 30 participants per offering, so register now: alanet.org/mhfa. Attendees are eligible to receive 7.5 credit hours toward their CLM certification.



New to Your Legal Management Career? We've Got You

ALA's Legal Management Fundamentals is a must-attend program for those in the first five years of their legal management careers. This comprehensive program focuses on the core competencies and best practices of legal management, broken out into four distinct modules:

- Legal Trends and Operations Management
- Financial Management
- Human Resources Management
- Leadership

Join like-minded industry peers from across the country for engaging and dynamic sessions led by industry veterans. You'll walk away with invaluable advice and practical tools and skills that you can apply immediately — plus, a new network of industry colleagues! Register now (alanet.org/lmf) to join us November 4–5 in Denver, Colorado!

What's Happening at Headquarters



Register Now for ALA's 2022 IP Conference

ALA's **Intellectual Property Conference for Legal Management Professionals** — to be held October 13–14 at the Hamilton Hotel in Washington, D.C. — is the premier IP-focused forum for administrators working in a legal practice setting. If IP is your area of expertise, mark your calendars to join open discussions, share ideas and problem-solve with your peers in the intellectual property community!

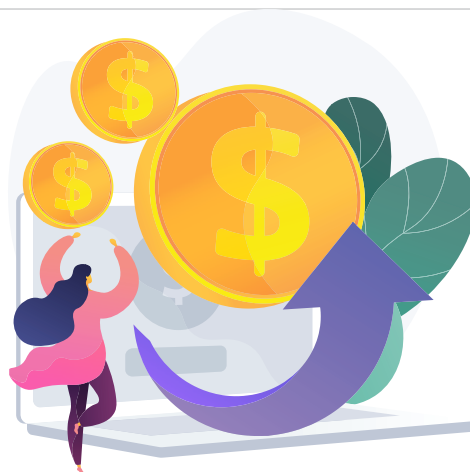
Topics to be addressed include:

- Patents, Trademarks and Copyrights — Maximizing Their Usefulness in the Current Post-Covid, Precession Economy
- Planning for the Future: How to Set Your Firm on a Path to Success
- Leading Your Firm in the Digital Ecosystem: What You Need to Know about AI, Smart Contracts Cryptos and NFTs
- Rule No. 1: Don't Lie (aka IT and Cybersecurity Compliance)

Member rates start at \$799. Visit alanet.org/IP to register.

Register by October 7 for HR 2: Performance Management and Compensation

Maximize your learning and enhance your problem-solving skills in this facilitated online, scenario-based course that covers developing strategic and operational goals among personnel at a law firm, including termination procedures, employee handbooks, training, motivational techniques, incentives and substance abuse. If you've completed HR 1: Employee Selection and Promotion, you'll receive your Legal Management HR Specialist Certificate. For more info and to register visit alanet.org/web-based-courses.



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