

# LEGAL MANAGEMENT

SEPTEMBER 2023  
VOLUME 42 • ISSUE 8

THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

## 6 Strategies to Revamp Your Performance Reviews

As the workplace evolves, your performance reviews should, too.





## FEATURES

**HUMAN RESOURCES MANAGEMENT** BY ERIN BRERETON

**KEEP EMPLOYEES FROM LEAVING BY PROVIDING WHAT THEY NEED**.....15  
Find out how to effectively retain qualified workers by offering the job experience they want.

**HUMAN RESOURCES MANAGEMENT** BY WENDY MCCLELLAN

**6 STRATEGIES TO REVAMP YOUR PERFORMANCE REVIEWS**.....19  
As the workplace evolves, your performance reviews should, too.

**LEGAL INDUSTRY/BUSINESS MANAGEMENT** BY JENNIFER NELSON

**5 STEPS TO A MORE EFFICIENT OFFICE**.....24  
These are the areas to optimize your processes and practice to make positive changes.

## COLUMNS

**BIG IDEAS: ALA EXECUTIVE DIRECTOR'S LETTER** BY ERYN CARTER, CAE

**HOW ALA HQ IS WORKING FOR YOU, OUR MEMBERS**.....3  
We hope to be an ever more indispensable resource for our members as they navigate the rapidly changing legal industry.

**BP PERSPECTIVE: INSIGHTS FROM A BUSINESS PARTNER** BY KAREN LEASTMAN AND CHRISTINA FLOYD

**FINANCING CAN HELP CREATE THE FIRM OF THE FUTURE**.....6  
Law firms are leading the way in developing workspaces that not only foster collaboration but also inspire creativity and enhance productivity.

**DIVERSITY DIALOGUE: BROADENING BUSINESS PERSPECTIVES** BY KHEVNA PATEL

**CREATING A CULTURE OF BELONGING BY IMPLEMENTING A ROBUST ONBOARDING AND INTEGRATION STRATEGY**.....9  
Creating a culture of belonging is vital to your firm's DEIA efforts.

**TOUGH TOPICS: CHALLENGING OFFICE CONVERSATIONS** BY VANESSA VALDEZ DALTON

**MASTERING THE DELUGE: HOW LEGAL PROFESSIONALS CAN OVERCOME INFORMATION OVERLOAD**.....12  
Conquering information overload is not about consuming more information, but leveraging the right information at the right time.

**MARKETING MATTERS: BOOST YOUR FIRM'S BRAND** BY ROSS FISHMAN, JD

**9 QUICK TIPS FOR WRITING CONTENT THAT GETS READ**.....28  
Following these tips will increase the value, impact and reader engagement of whatever you send.

## DEPARTMENTS

**INDUSTRY NEWS: LEGAL MANAGEMENT UPDATES** BY NICOLE BLACK

**ARTIFICIAL INTELLIGENCE AND CHATGPT IN LEGAL PRACTICE: NAVIGATING THE PROS AND CONS**.....31  
Generative AI has the potential to transform the legal industry and usher in a new era of AI-powered legal workflows.

**TIPS AND TRENDS: INDUSTRY ADVICE AND DEVELOPMENTS** BY RAQUEL GOMES

**THE SECRET TO SCALING YOUR LAW FIRM? HIRE VIRTUAL LEGAL ASSISTANTS**.....34  
While one can hire in-person assistants, there's also a modern alternative: hiring qualified virtual assistants.

**ALA NOW**

**ALA FACES: MEMBER AND CHAPTER NEWS**

**ANNIVERSARIES, AWARDS AND APPOINTMENTS**.....36

**AT ALA: NEWS ABOUT ALA**

**WHAT'S HAPPENING AT HEADQUARTERS**.....37

## LEGAL MANAGEMENT STAFF

### PUBLISHER

Eryn Carter, CAE  
[ecarter@alanet.org](mailto:ecarter@alanet.org)

### DIRECTOR, MARKETING AND COMMUNICATIONS

Theresa Wojtalewicz  
[twojtalewicz@alanet.org](mailto:twojtalewicz@alanet.org)

### SENIOR MANAGING EDITOR

Valerie A. Danner  
[vdanner@alanet.org](mailto:vdanner@alanet.org)

### ASSOCIATE EDITOR

Justin Askenazy  
[jaskenazy@alanet.org](mailto:jaskenazy@alanet.org)

### ADVERTISING OPPORTUNITIES

Fred Ullman  
[fullman@alanet.org](mailto:fullman@alanet.org)

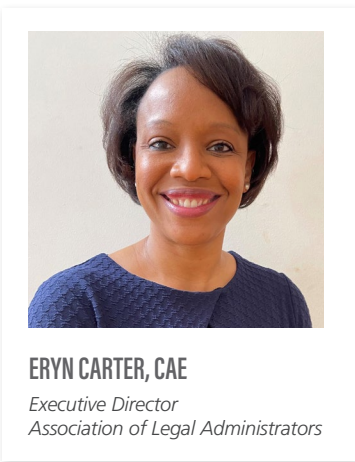
### USER INTERFACE WEB DEVELOPER

Bert R. Saper  
[bsaper@alanet.org](mailto:bsaper@alanet.org)

### GRAPHIC DESIGNER

Andrea Fitzpatrick  
[afitzpatrick@alanet.org](mailto:afitzpatrick@alanet.org)





**ERYN CARTER, CAE**  
*Executive Director  
Association of Legal Administrators*

“  
In all areas of life,  
challenges are inevitable,  
but what’s important is  
how we respond to them.  
ALA is no exception.”

## How ALA HQ Is Working for You, Our Members

**“You gain strength, courage and confidence by every experience. You must do the thing you think you cannot do.”** These profound words attributed to Eleanor Roosevelt neatly encapsulate my approach toward the challenges I face as a leader and that ALA faces as an organization.

Certainly, there are times when we might try something new or different and it doesn’t always create the results we expected. ALA members can attest that being a leader in their legal organizations is no easy feat, and uncertainty and trial and error are sometimes integral components of their role. I am energized by the fact that we at ALA headquarters are working proactively to address the needs and concerns that our members have and help them to overcome and learn from their challenges. Here are some of the ways we are doing this:

### 1. Ensuring that ALA HQ has an experienced and engaged professional staff who reflect our Core Values

Within the last year, we have made key hires for our Business Development, Finance, Human Resources and Membership teams. These staff additions to our team bring decades of collective association and nonprofit management experience to ALA, and their expertise in their respective fields enables us to blend fresh ideas and approaches with the tried-and-true methods and institutional knowledge that have allowed ALA to achieve 50+ years of success.

### 2. Aligning staff priorities with ALA’s Strategic Direction

It is critical that our performance as a staff is constantly being measured against the pillars and success indicators of ALA’s Strategic Direction. This not only provides congruency between the Board and staff leadership — it also helps our members


and business partners see how both entities are aligned and are messaging like-minded goals and aspirations for the organization.

### 3. Providing superior customer service to members and business partners

The success and viability of ALA is rooted in our service to and relationships with current and prospective members and business partners. This is an area of focus and responsibility for all of us and, although we may miss the mark on occasion, we strive for 100% satisfaction.

I consistently encourage our staff to approach each of these priorities with a can-do attitude, just as Roosevelt advocated. No idea is worth disregarding if it can help our members. In all areas of life, challenges are inevitable, but what's important is how we respond to them. ALA is no exception.

While complete success may be our goal, "failing forward" can be just as valuable because it allows us to learn and grow as an organization, a staff and as people. In doing so, we hope to be an ever more indispensable resource for our members as they navigate the rapidly changing legal industry.

 [ecarter@alanet.org](mailto:ecarter@alanet.org)

 [linkedin.com/in/eryn-carter-778a449](https://www.linkedin.com/in/eryn-carter-778a449)



 **Mental Health FIRST AID**  
from NATIONAL COUNCIL FOR MENTAL WELLBEING

**FALL 2023  
REGISTER TODAY**

## MENTAL HEALTH FIRST AID Certification Program

Learn how to identify, understand and respond to signs of mental illness and substance use disorders.

**Nearly  
1 IN 5**  
in the U.S. lives  
with a mental illness.  
*Source: National Institute  
of Mental Health*

The program consists of self-paced content and one 6.5-hour instructor-led session over Zoom. Choose from one of the following course dates:

- **Friday, October 6**
- **Friday, October 13**
- **Friday, October 27**
- **Friday, November 3**

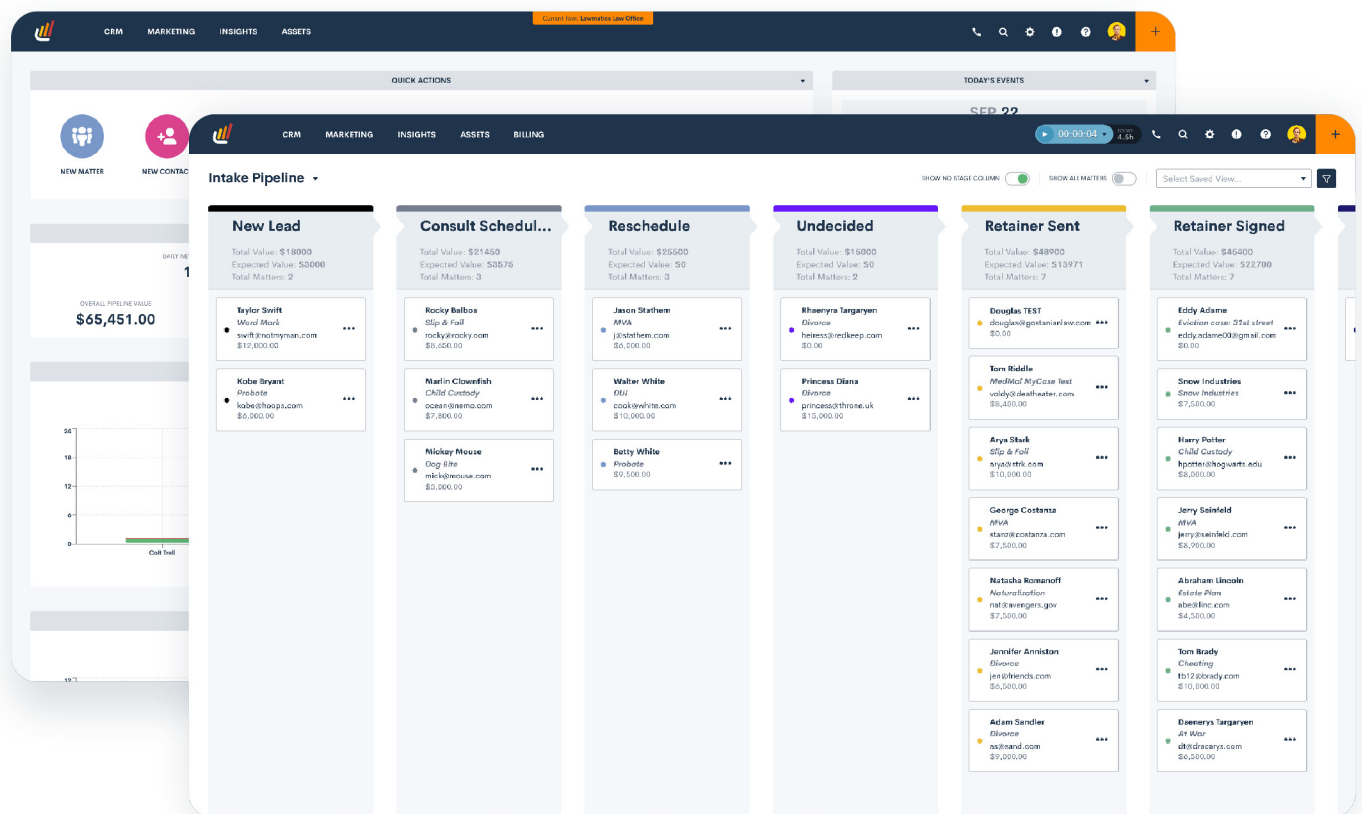
Each session is limited to just 30 participants!  
All courses take place from **9 a.m.–3:30 p.m. Central.**

[alanet.org/mhfa](https://alanet.org/mhfa)



# Try The #1 Legal CRM for Law Firms

Best-in-class tools for **legal client intake, workflow & marketing automation, legal billing**, document management, and much more — all in one easy-to-use law practice software.



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

Ryan McPhie  
Managing Attorney, Grand Canyon Law Group

(800) 883-1105

Visit [Lawmatics.com](http://Lawmatics.com)

Learn More



**CHRISTINA FLOYD AND  
KAREN LEASTMAN**

*Vice Presidents  
First American Legal Finance*

## Financing Can Help Create the Firm of the Future

**In the ever-evolving corporate world, law firms are leading the way in developing workspaces that not only foster collaboration but also inspire creativity and enhance productivity.**

Through a strategic financing approach, they are maximizing the potential of their physical and digital workplaces. This financial strategy can significantly elevate the work environment and set the stage for a dynamic, forward-thinking workplace.

“  
Leading law firms are using strategic financing to elevate their workplaces — fostering an environment of connection, culture and collaboration.”

### MAKE IMPACTFUL INVESTMENTS IN YOUR PEOPLE

The power of a well-designed office shouldn't be underestimated. By investing in spaces that promote physical well-being and social interaction, you can create a positive workplace environment that encourages collaboration, creativity and success.

Modern offices include features such as:

- » Collaboration labs
- » Fitness centers
- » Lounge/cafes
- » Meditation rooms
- » Rooftop patios
- » Training spaces



### BRIDGE THE GAP TO BOOST PRODUCTIVITY

Top-tier law firms have adeptly managed to bridge the gap between the physical and digital realms of the workplace, fueling a significant upsurge in productivity

through their investment in hybrid-supportive technology. Video-enabled conference rooms paired with sophisticated collaboration tools have emerged as a vital component, ensuring seamless communication among colleagues, regardless of their location.

Equally crucial in this era of hybrid workplaces are robust cybersecurity measures. This includes the implementation of firewalls, antivirus software and VPNs, serving as an integral shield against ever-looming cyber threats.

Further supplementing the productivity chain are mobile devices and dedicated productivity applications. These innovative tools empower employees with the ability to access crucial information and engage in meaningful collaboration, irrespective of their physical location, truly exemplifying the power of a well-integrated hybrid workplace model.

## BUILDING A FINANCING STRATEGY FOR SUCCESS

Amid today's economic landscape, business leaders are strategically leveraging financing to optimize their investment returns. For law firms to be able to invest in their people and create a tech-enabled workforce, they need to make significant investments.

With financing as a strategic tool, the benefits are multifaceted. Leasing allows firms to maximize partner distributions, finance 100% of the expenses — including soft costs — and manage multiple projects and vendors simultaneously. Moreover, it provides an effective hedge against inflation and allows for the diversion of cash toward higher-yielding investments. A custom financing strategy empowers businesses with greater control and flexibility over their economic outcomes.

Leading law firms are using strategic financing to elevate their workplaces — fostering an environment of connection, culture and collaboration. By investing in employee well-being and modern office features, they're creating positive environments that spur creativity and teamwork. Paired with hybrid-supportive technology, firms ensure seamless communication and robust security. A well-rounded financing strategy frees up capital for higher-yielding investments, giving firms a strong competitive edge.

### ABOUT THE AUTHORS

**Christina Floyd** is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully completed the Legal Management Finance Specialist Certificate Program through ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 250 firms.

✉ [Christina.floyd@faef.com](mailto:Christina.floyd@faef.com)

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

✉ [Karen.leastman@faef.com](mailto:Karen.leastman@faef.com)



**ATTENTION!  
ATTENTION!**

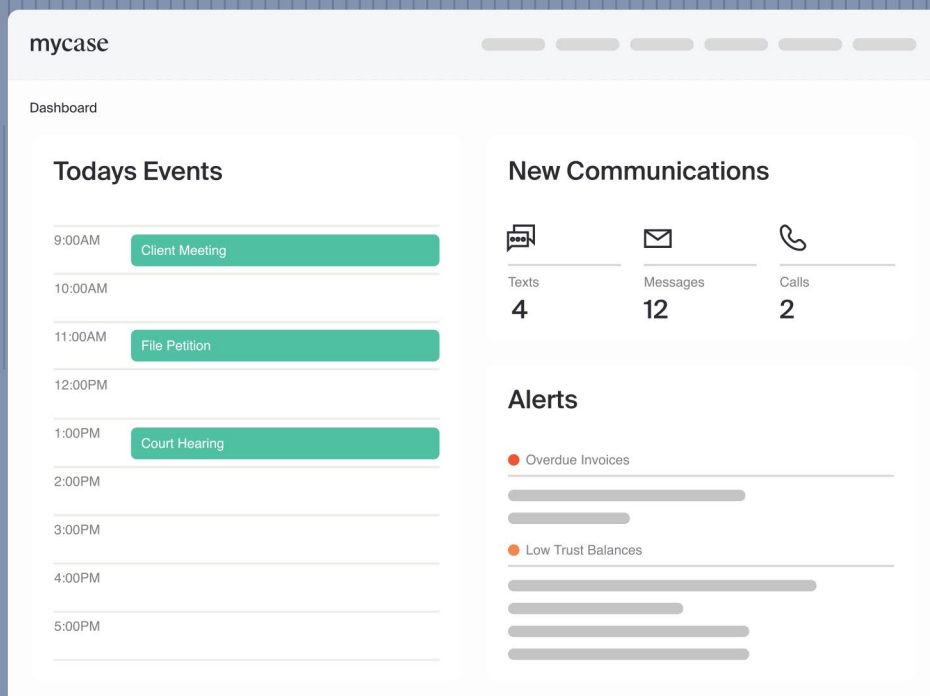
It's open enrollment time for the 2024 Organizational Pricing Program! Enroll between August 1–September 30, 2023 to secure your participation.

**Questions?**  
Contact [membership@alanet.org](mailto:membership@alanet.org).



# The #1 Rated Law Practice Management Software

Streamline your cases, track more time, communicate with clients quickly, and get paid faster with MyCase



“As a business owner, the impact it has had on clients paying on time is tremendous.”

**Michelle Diaz**

Managing Attorney, The Law Office of Michelle E. Diaz

[Learn More](#)

[Visit MyCase.com](https://www.MyCase.com)

800-571-8062





**KHEVNA PATEL**

*ALA's Diversity, Equity, Inclusion and Accessibility Committee*

# Creating a Culture of Belonging by Implementing a Robust Onboarding and Integration Strategy

**Imagine attending a party that you were invited to where the host is too busy to come over and say hello. While you walk around, mingle with other guests and manage to have a good time, you don't feel welcomed.**

While diversity, equity, inclusion and accessibility (DEIA) initiatives are vital for fostering an inclusive workplace, it's equally important to move beyond DEIA and focus on creating a culture of belonging by implementing a comprehensive onboarding and integration program that nurtures that culture. You successfully recruited talent and invited them to join your party. Now, it is time to welcome them and be a great host. Here's how.

“While DEIA initiatives are vital for fostering an inclusive workplace, it's equally important to move beyond DEIA and focus on creating a culture of belonging by implementing a comprehensive onboarding and integration program that nurtures that culture.”

## 1. Establish a Welcoming Environment

Reach out to the new hire before their start date to provide information about the onboarding process, important documents and any prearrival tasks. Ensure that the new hire's workspace, including their desk, computer and necessary software access, is prepared in advance. Include a customized welcome package with a handwritten note. Help new hires feel welcomed, valued and included from their first day. The sense of belonging enhances overall employee engagement, satisfaction and retention.

## 2. Customize Onboarding Programs

Develop onboarding programs that address the unique needs and experiences of new hires. Consider their background, identities and individual strengths. Tailor the program to provide the necessary resources, training and support to help them succeed. This personalized approach enhances a sense of belonging and ensures new hires are set up for success.

### 3. Promote Professional Development

Encourage ongoing learning and growth and support new hires’ participation in industry conferences and workshops. Create opportunities for them to build diverse networks within the firm. Pair the new hire with a senior attorney who can provide guidance, share insights and assist with their career development within the firm. Encourage participation in employee resource groups or affinity networks that foster connections among individuals with shared backgrounds or interests. These networks provide a support system, facilitate mentorship and offer a sense of community, contributing to a culture of belonging.

### 4. Provide Clear Communication and Feedback

Establish a feedback-rich culture that encourages ongoing communication between new hires and firm stakeholders. Regularly check in on their progress, provide constructive feedback, and offer opportunities for growth and development. This ensures that new hires feel supported, have a clear understanding of their career trajectory and are actively involved in their professional growth within the firm. Foster a culture where the new hire feels comfortable providing feedback on their onboarding experience, work environment and opportunities for growth. Actively listen to their input and implement improvements when appropriate.

### 5. Ensure Integration into Firm Culture

Promote opportunities for new hires to engage with the firm’s culture and values beyond the onboarding process. Encourage their participation in firm-wide initiatives, events

and committees. Provide platforms for them to contribute their unique perspectives and actively involve them in decision-making processes.

This integration into the firm’s culture strengthens their sense of belonging and fosters their long-term engagement. Organize team-building activities — such as retreats, social events or volunteer opportunities — to foster stronger relationships and promote a positive team dynamic. Reinforce the firm’s values and commitment to DEIA. Encourage the new hire to participate in initiatives that align with these values.

### 6. Offer Ongoing Support

Continually check in with the new hire to ensure they are adjusting well and have the necessary resources to succeed. Offer support, guidance and opportunities for growth throughout their tenure at the firm. Communicate clear pathways for career advancement within the firm, outlining expectations, performance metrics and promotion processes. Provide opportunities for the new hire to take on additional responsibilities and challenging assignments.

These initiatives not only benefit individual employees but also enhance overall firm performance, client relationships and firm reputation in an increasingly diverse legal landscape.

#### ABOUT THE AUTHOR

**Khevna Patel** serves on ALA’s Diversity, Equity, Inclusion and Accessibility Committee and is a member of the Greater Los Angeles Chapter.

[alanet.org/resources/diversity](https://alanet.org/resources/diversity)



WHEN IT BECOMES  
CLEAR YOU NEED TO  
MAKE A **CHANGE**



## CHANGE TO A COMPLETE FIRM SOLUTION

FINANCIAL | PRACTICE | FIRM

**Orion ePay<sup>®</sup>**  
Coming Soon!

### CHANGE TO ACHIEVE A COMPETITIVE ADVANTAGE

Transform your firm with a scalable, fully integrated software system that delivers up-to-the minute information to your professionals, executives, and management team.

### CHANGE WITHOUT PAIN

Work with experts dedicated to your success. From kick-off to launch and beyond, you'll have a proven team by your side.

### CHANGE WITH CONFIDENCE

For more than 35 years, law firms have depended on Orion to build their practices, analyze business opportunities, and deliver outstanding client service.

### *...Change to Orion*

Powerful firm management software that delivers rapid return on investment, increased profitability and reliable performance for law firms nationwide.

Join us at  
**Legal  
Management  
Fundamentals**  
Oct 13-14, 2023

YOUR SERVER | OUR SERVER | YOUR CHOICE





**VANESSA VALDEZ DALTON**  
*Vice President of Marketing  
Rapid Legal*

## Mastering the Deluge: How Legal Professionals Can Overcome Information Overload

**In the tumultuous waters of today’s fast-paced digital world, legal professionals are caught in a relentless tempest of information. Like intrepid swimmers battling the tides, they navigate through a deluge of emails, memos, court documents, legal research and case files that threaten to engulf them. It’s a struggle that can quickly transform into an overwhelming surge, leaving them gasping for breath in the face of information overload.**

“  
The average person is  
bombarded by the equivalent  
of 174 newspapers worth of  
data per day, so organization  
is critical when fighting  
information overload.”

The consequences are profound, with productivity sinking by a staggering 40% and the ability to make informed decisions teetering on the edge. Even more astonishingly, this deluge of data has been known to temporarily dampen the very intellect that legal professionals rely on. But fear not, for amid the chaos lies a strategic path forward and the right tools to conquer the formidable challenges of information overload.

Armed with a steadfast approach and wielding the arsenal of technology, you can rise above these turbulent currents and not just survive but thrive in your vital roles. By taming the storm and harnessing the power of knowledge, you can navigate the information flow with confidence, clarity and unyielding determination.

### EMBRACE THE POWER OF ORGANIZATION

The average person is bombarded by the equivalent of 174 newspapers worth of data per day, so organization is critical when fighting information overload. Implementing an effective filing system, whether physical or digital, allows legal professionals to quickly locate and access critical documents.

Categorize information based on relevance, urgency and priority, employing consistent naming conventions and folder structures. Additionally, leverage technology solutions such



as document management systems and case management software to streamline information retrieval and minimize clutter.

## **FILTER AND PRIORITIZE**

Not all information is created equal, and learning to filter and prioritize is essential in managing information overload. Utilize email filters to automatically sort messages into folders based on sender, topic or urgency.

Establish a system of tags or labels to categorize emails and documents, enabling quick identification of important items. By assigning priorities to tasks and documents, legal professionals can focus on the most urgent matters at hand and reduce the risk of missing deadlines or critical details.

## **OPTIMIZE LEGAL RESEARCH**

Research is a fundamental part of a legal professional's work, but it can also contribute significantly to information overload. To optimize legal research, take advantage of online databases, digital libraries and research platforms that offer advanced search capabilities.

Familiarize yourself with Boolean operators and advanced search techniques to refine your queries and obtain targeted results. Additionally, consider using research tools that provide citation and research management features, making it easier to organize and retrieve relevant information.

## **COLLABORATE AND DELEGATE**

Legal professionals often work as part of a team, and effective collaboration is crucial in managing information overload. Foster a culture of open communication and knowledge sharing within your firm or legal department. Support is crucial to a healthy work environment.

Leverage collaboration tools and project management software to facilitate seamless information exchange and assign tasks. Delegating responsibilities to trusted colleagues not only lightens the load but also ensures that each team member can contribute their expertise and stay focused on their areas of strength.

## **CONTINUOUS LEARNING AND PROFESSIONAL DEVELOPMENT**

The legal landscape is ever-evolving, with new laws, regulations and precedents emerging constantly. By investing in continuous learning and professional development, legal professionals can stay ahead of the curve and mitigate information overload.

Attend relevant seminars, webinars and conferences, and participate in legal associations or online forums. Engage in ongoing legal education programs to enhance your information literacy and knowledge, enabling you to filter out the noise and focus on the most critical updates.

## **PRACTICE MINDFULNESS AND SELF-CARE**

In the quest to overcome information overload, it is crucial to prioritize one's well-being. Practice mindfulness techniques such as meditation, deep breathing or mindfulness exercises to cultivate mental clarity and reduce stress. Make time to use meditation apps and practice breathing exercises, both of which are proven to reduce stress and boost productivity.

Take regular breaks and establish healthy work-life boundaries to prevent burnout. Engage in activities outside of work that bring you joy and relaxation, as these rejuvenating moments can enhance one's ability to handle information effectively.

## **MASTER THE DELUGE**

Overcoming information overload is a constant challenge for legal professionals, but by implementing effective strategies and using appropriate tools, it is possible to navigate this digital deluge successfully. This will improve the quality of work, increase confidence and noticeably increase productivity.

By embracing organization, filtering and prioritizing, optimizing legal research, fostering collaboration, pursuing continuous learning, and prioritizing self-care, you can reclaim control over information overload and enhance your productivity and decision-making abilities. Remember, conquering information overload is not about consuming more information, but leveraging the right information at the right time.

### **ABOUT THE AUTHORS**

**Vanessa Valdez Dalton** is Vice President of Marketing for Rapid Legal, a legal services and technology company that automates the processing of legal documents for law firms. Having worked in and supported the legal industry for over a decade, she is keenly aware of the challenges and opportunities legal professionals face.

 [rapidlegal.com](https://www.rapidlegal.com)

 [linkedin.com/in/veevaldez](https://www.linkedin.com/in/veevaldez)

# Coyote Analytics

A  SurePoint<sup>®</sup> Solution



## Intuitive Legal Software with You in Mind

Financial management solutions to help you streamline operations and better serve your clients

**Practice Management:** Empower your team to work more effectively and efficiently by accessing all critical data from a single location.

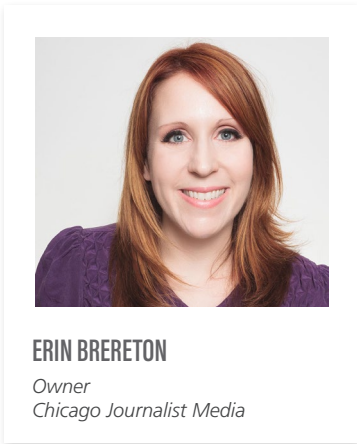
**Financial Management:** Users can perform all accounting and financial operations within a single paperless environment.

**Business Intelligence:** Gain immediate access into the financial data and reporting capabilities you need to develop winning strategies for your firm.

**Timekeeping:** Capture every minute from anywhere with easy to use mobile apps.

Scan the QR code to learn more about SurePoint's solutions today!





**ERIN BRERETON**  
Owner  
Chicago Journalist Media

# Keep Employees from Leaving by Providing What They Need

*Find out how to effectively retain qualified workers by offering the job experience they want.*

**In the first half of 2023, nearly all (97%) of the law firms and legal departments that were hiring experienced challenges finding skilled talent, according to a survey conducted by Robert Half.**

“Last year, 78% of lawyers and law firm and legal department managers said they were planning to hire more contract professionals in the first half of 2023.”

To reduce attrition and hiring needs, legal industry employers need to know which specific elements will convince valued team members to stay — such as work-life balance, one of the primary reasons lawyers told legal tech provider Clio they planned to leave a job last year.

Today, a number of workforce members expect to be able to work remotely; a 2022 American Bar Association survey found 44% of attorneys would depart their current job to work for a new employer that provided more opportunities to telework.

Since the COVID-19 pandemic, Eagan Immigration — which previously let employees work from home a few days a week — has become a primarily remote law firm, aside from a small three-person office in the Washington, D.C. area.

The firm, which handles a range of immigration cases, has also been able to maintain a low turnover rate, which this year has stayed below 5%, according to HR Director Maddie Stough.

“We’ve had really great retention,” Stough says. “Because so many folks, at some point — especially in the legal field — spent part or all of 2020 and 2021 working from home, they know now that their jobs can be done remotely. The flexibility in our work schedules is something that really does help people have some balance. It’s a valued thing for a lot of folks — but there are other things we’ve been really proud to implement that have kept people engaged, too.”



“We created [career paths] based on the experience and skills of our staff members and tailored them to their strengths and interests.”

## ADDRESSING SELF-CARE CONCERNS

Eagan Immigration’s other employee-based initiatives include providing a number of free sessions a year with a counselor — which can be helpful, Stough says, as the cases firm members work on can be quite emotional.

“Because of the connection and time spent with our clients to understand and then tell their story, there’s a real potential, unfortunately, for secondhand trauma,” she says. “We also, in addition to our PTO days and other holidays, have mental health PTO days. Many of our folks wake up in the morning and say, ‘I couldn’t stop thinking about that case from yesterday; I’ve just got to take the morning off,’ or ‘I need to take a day and just reset.’ Our team really values that.”

Eagan has also brought contact attorneys and paralegals on board at times when needed — something Robert Half’s research suggests can potentially raise morale. In its legal trends survey, more than 4 in 10 hiring managers said their retention issues stemmed primarily from inflated workloads and burnout.

Last year, 78% of lawyers and law firm and legal department managers said they were planning to hire more contract professionals in the first half of 2023.

“One of the things that’s super important to us is making sure our employees feel like they’re not being totally overloaded,” Stough says. “If we can balance out some of the work by bringing someone on even part-time as a contractor, that gives us a little bit of leeway. With immigration, there are ebbs and flows, and we want people to have vacations or maternity leave. It’s been a successful way for us to augment the staff.”

Lengea, a niche law firm that works with members of the nonreimbursable health care industry, such as med spas, has had a couple of employees leave in recent years. However, most of its seven attorneys and five legal support staff members have been in their roles for some time, according to Managing Partner Sara Shikhman.

The firm’s unlimited time-off policy, Shikhman says, has helped incentivize employees to stay. A number of firms now embrace an open-ended PTO approach, according to a 2022

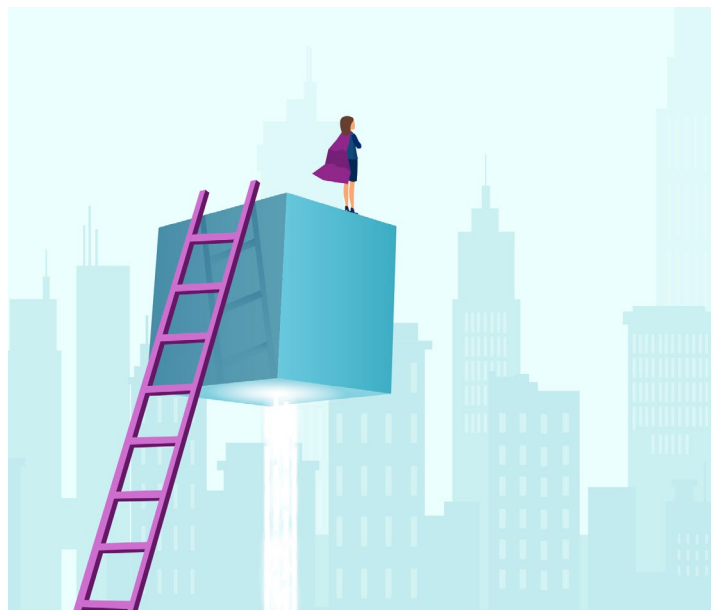
law firm survey conducted by Aon — which found 62% of law firms offer a discretionary or flexible time-off option.

“If people want to take a month, or six weeks, we’re open to them doing that,” Shikhman says. “You could take off two months to travel or take a different bar exam or spend time with your family. If you find a way to have some other team members cover for you fully, then you are still paid for the time off — and if not, you could take unlimited unpaid time off for as long as you want.”

## HELPING TO SHAPE EMPLOYEES’ FUTURES

Turnover activity has been low at Andrew Pickett Law, PLLC, since the firm — which employs two attorneys and four support staff members — established fixed career paths for employees, according to lead trial attorney Andrew Pickett. The outlined steps, Pickett says, and upskilling opportunities the firm supplies have been a big factor in its ability to retain talent.

“We created [the career paths] based on the experience and skills of our staff members and tailored them to their strengths and interests,” he says. “[An] example for our support staff could involve someone beginning as an entry-level paralegal, then [becoming] a legal assistant and finally taking on the office manager/paralegal role. Along the way, they would receive additional training and mentoring to help them develop their skills.”





## “One of the best things law firms can do is meet employees where they are to find out what they want.”

Employees have responded positively to the educational assistance the firm offers, Pickett says. “Legal professionals take pride in developing their skills and expertise. We provide a variety of upskilling opportunities, such as workshops, seminars, online courses, conferences and certifications that our employees can take advantage of,” he says.

In addition to a training curriculum that includes practice area-specific instruction, Goulston & Storrs sponsors a number of mentoring opportunities for younger associates — an operational element that law firm guide Chambers Associate cited when it named Goulston & Storrs one of the top 2023 law firms for associate retention.

Associates at the firm are paired with both a partner-level mentor, who is a director [partners are referred to as directors at the firm] within the firm, and an associate sibling, who’s able to answer any questions and offer guidance, according to the firm’s Chief Legal Talent Officer Karen Febeo. Both mentors participate in the firm’s Keys to Success program for junior associates, in conjunction with the firm’s Legal Talent team — which involves a monthly facilitated discussion on topics such as how to approach new assignments, manage their workload and understand expectations.

“When we hire associates, our goal is to help them grow, develop and succeed, and ultimately become a director with the firm,” Febeo says. “We have a low-leverage model. Associates are getting real-world experience, working directly with more senior attorneys and directors — it provides very meaningful and sophisticated work early on.”

### GAUGING EMPLOYEE SENTIMENT

Law firms can utilize several methods to determine which specific job aspects will resonate with their employees. For instance, Pickett’s firm obtained input from firm members both in writing and face-to-face.

“We have conducted surveys and focus groups with our staff to understand their needs better,” he says. “Also, it [is] a good practice to keep an eye on industry trends and look for potential areas of improvement.”

An associate liaison committee that meets monthly at Goulston & Storrs acts as a conduit to convey questions and issues that associates raise. For example, the firm piloted a

Feedback Fridays initiative in one of its practice areas based on an associate’s request for additional ways to encourage effective, real-time feedback.

“Firm leadership is very transparent and communicative with attorneys at all levels,” Febeo says. “Each month, the managing directors also meet with a small group of associates, as well as a small group of directors, to provide an opportunity for all attorneys to raise any questions, topics, concerns or areas of interest in an intimate setting that allows for open and candid discussion.”

Eagan has added three primary touch points throughout the year to survey staff about their work experience; along with an annual engagement survey in the fall as the firm begins to reconsider its benefits packages, it also conducts a pulse survey to see what features employees are still or might someday be interested in.

In the spring, Stough meets with firm members over the course of about six weeks for at least 30 minutes to discuss what they like about working at the firm and what they think could potentially be different — and to talk about any skills they’d like to improve.

One of the best things law firms can do, Stough says, is meet employees where they are to find out what they want.

“They honestly are very willing generally to tell you — and what they want is not always more money or more time off,” she says. “Asking your staff what they would like to see in an ideal employer, and then doing something with that information — not just taking it and sitting on it for six to eight months,” Stough says. Instead, she says to immediately respond to staff with what you’ll begin working on and let them know you appreciate their feedback. “Even that act is a great first step. Following through on it is really crucial.”

#### 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.

 [breretonerin@gmail.com](mailto:breretonerin@gmail.com)

 [twitter.com/erbrer09](https://twitter.com/erbrer09)

 [chicagojournalist.com](http://chicagojournalist.com)



# Guaranteed hotel discounts for your firm

As a business owner, you have a lot to balance to keep your company running smoothly. Join our award-winning program to gain access to a guaranteed discount across 5,800+ participating hotels globally when you book business or personal travel.

[Join today at businessedge.ihg.com](https://businessedge.ihg.com)

IHG<sup>®</sup> HOTELS & RESORTS



REGENT



VIGNETTE COLLECTION

KIMPTON HOTELS & RESTAURANTS

HOTEL INDIGO

VOCO



CROWNE PLAZA



EVEN



Garner

avid

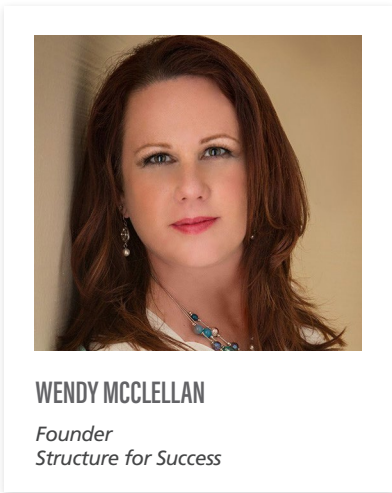
ATWELL SUITES



CANDLEWOOD SUITES

IHG ONE REWARDS





# 6 Strategies to Revamp Your Performance Reviews

*As the workplace evolves, your performance reviews should, too.*

**The performance review management systems of the past will not survive — nor should they. They were built for a workplace that no longer exists. Performance reviews must evolve with the changing workplace.**

“Shifting the emphasis from manager to employee makes the [performance management] conversation a powerful, positive experience that builds trust and strengthens the relationship between the manager and employee.”

Younger generations of empowered employees and the continuing proliferation of remote work are transforming the workplace. Much work today — especially the knowledge work within the legal industry — is more flexible and less location dependent. Further, younger employees are more likely to seek work that is rewarding and leadership that is interactive, and they are less willing to accept the one-way command-and-control structures of the past.

One relic of this old worldview is the yearly performance review, with its emphasis on checklists and performance scores. Nobody likes traditional performance reviews. They are top-down, time-consuming, production-halting, anxiety-provoking and sometimes adversarial, and generally look to record the past rather than develop future performance. Since these old-style reviews typically happen once a year, they are a blunt instrument at best, ineffective for course correcting in today’s fast-paced workplace.

“There is no evidence that these programs increase either motivation or performance,” says John Boyce, Vice President of Human Resources at AMSOIL, Inc., where he recently instituted a new performance management system. “Our performance management program is the cornerstone of our retention strategy.”

By reimagining the traditional performance management conversation and moving to a strength-based program, Boyce believes that everyone benefits. “Shifting the emphasis from manager to employee makes the [performance management]

conversation a powerful, positive experience that builds trust and strengthens the relationship between the manager and employee.”

## TOWARD A NEW STYLE OF PERFORMANCE MANAGEMENT

One of the biggest raps on the old model of annual performance reviews is that it brings work to a standstill, stirring competition and killing team cohesion and productivity. Employees stop working to fill out forms and stress about the meeting, while their managers lock themselves in their offices and struggle to remember who did what the previous 12 months. The process hits an even narrower funnel when the managers send their evaluations up the chain for approval.

This traditional performance review is inefficient and ineffective, akin to using a kitchen knife for scalpel work. In a recent SHRM article, a WTW survey reported that 72% of employers agreed that supporting the development and productivity of their employees is a primary objective, but only 31% said their performance management program was meeting that objective.

However, rethinking performance reviews doesn't mean getting rid of them altogether. Providing employees with the necessary feedback is still an essential managerial responsibility. Many leaders and businesses depend on performance reviews to reprioritize duties, clarify accountability and deal with ongoing issues. Metrics, key performance indicators (KPIs) and benchmark goals are still the best ways to measure employee performance. We don't need to change what we do — we need to change how we do it.

A new approach to performance management is required to lead employees effectively — an approach that is more frequent, less top-down and more interactive. Many firms are adopting monthly check-ins regarding quarterly goals, addressing issues immediately as they arise, and closing out the year with a scaled-back (but still formal) annual review. Interacting with staff throughout the year cultivates employee success and engagement and attracts more motivated workers. Additionally, recruiting firms are finding that evolved performance management programs are a strong recruiting tool for younger workers.

## NEW STRATEGIES IN PERFORMANCE REVIEW

What changes in the performance process are most effective for today's businesses? Here are six you can try.



### 1. Talk, Talk and Talk Some More

Don't limit talks with your staff to once or twice a year. Schedule frequent conversations to discuss performance. And don't be afraid of spontaneous drop-ins as a way of establishing and maintaining a collaborative relationship. Make sure these conversations are engaging and reciprocal — you want your employees invested in their own growth and performance.

These conversations don't need to be marathons. Keep them short, focused and simple. Set monthly or quarterly goals and priorities as a place to begin. Then use one-to-one guides to direct and document the conversations, during which you can discuss things like growth, customer feedback and/or recognition.

Once the meetings are on the calendar, don't reschedule unless there's an emergency. When you reschedule or postpone, you imply the meetings are not a priority, and the employee will follow your lead.

### 2. Set Clear Expectations

Set clear performance goals and expectations at the beginning of the year so employees understand their responsibilities. This practice lends objectivity to the review process by introducing measurable targets. It also keeps the conversations focused on the future and gives employees goals to work toward. Having these conversations early in the year allows the leader to explain how each employee's duties fit into the firm's overall strategy.



---

**“We don’t wait for an annual review to address issues. We address anything — positive and negative — right away.”**

---

Business in the 21st century is nothing if not fast-paced. Markets change quickly and firms must adapt just as quickly. Last month’s job requirements may no longer apply. Remember to be flexible with your expectations, adapt your goals or metrics when needed, and explain these changes with full transparency.

Heather Parker, Owner of Parker Law, hosts a quarterly strategic retreat with her staff to establish procedure improvements and quarterly goals, and to set personal and professional development goals for each staff member. These goals then become part of the measurements used in her performance reviews. “These retreats are essential to our understanding of where we want the firm to advance over the next three months,” says Parker. “No one is excluded from the process, and everyone has an equal voice.”

### 3. Simplify the Process

There is no need for your review process to be complicated or cumbersome — especially with more frequent conversations.

Older methods of the annual review process had long forms, extensive questions and idiosyncratic ratings systems. They often took the leader days to complete and deliver, thus slowing the firm’s production.

Melissa Hirst, Chief Operating Officer of Altitude Community Law PC, has created a simple questionnaire using Survey Monkey. The self-evaluation, as well as the questionnaire for the supervisor and peers, has approximately four (proprietary) questions. “The answers are anonymous, and the questions are thought-provoking and open-ended,” says Hirst, who is a member of the Mile High Chapter. “But they don’t require long-winded answers.”

Simplifying the process for the review, including more frequent conversations with your staff, addressing performance issues immediately and involving your employees in the process, fosters a culture of transparency and accountability.

### 4. Use Self-Evaluations and Solicit Feedback

Self-evaluations are a great way to have your employees think about what they want for the year and a good starting point for learning what skills and resources are important to their success.

At her quarterly strategic retreats, Parker has each employee complete a self-evaluation for their last three months. “The self-evaluations are a way to treat your employees like the adults they are by giving them a voice in their own success or failure. We have found completing these self-evaluations on a consistent basis helps them focus on the bigger picture,” she says.

Hirst involves the entire firm in performance reviews. Her short review questionnaire is sent to the employee, their immediate supervisor, everyone in the employee’s department and everyone in the firm. Responses from the employee’s department are mandatory, but for the others they are optional. She has found that this process of inclusion has fostered an atmosphere of accountability. Adding input from employees’ colleagues or from other managers grants a fuller picture of the employees’ capabilities and contributions.

This 360 approach is not a lecture. It allows the employee to have an open, two-way conversation with their immediate supervisor. It also empowers the employee to have candid conversations with their leader about what resources and training they need to be successful. Hirst observes that the inclusion of other departments “adds value to the process and enhances the culture of mutual respect regardless of position within the firm.”

### 5. Create Forward Focus to End Recency Bias

Recency bias — building a review on an employee’s most recent performance while ignoring earlier efforts — is a sure-fire way to undermine your review process. Parker avoids recency bias by creating a full open-door policy. “We don’t wait for an annual review to address issues. We address anything — positive and negative — right away.” Hirst mentions that her review questionnaire has broad questions, so the focus is not on a single project.

Both Hirst and Parker establish their employee goals at the beginning of the year, which acts as a baseline and allows the employees and their leaders to map out a path for professional development that aligns with the firm’s strategies. Monthly, quarterly and annual conversations are more impactful and effective when focused on the employee’s future actions rather than past mistakes. Performance reviews have the power to demotivate employees and destroy company morale if they are not forward focused. Focusing on the future instead of the past keeps employees engaged and goal driven — especially when backed with frequent and consistent conversations about those goals.

Before Hirst changed the firm’s performance reviews, she noticed that their legacy and high-producing employees were

“Performance reviews are less impactful for great employees if they don’t have items to work on. Instead of focusing on what they did wrong, we focus on the future. Now we use the review process to encourage, retain and stimulate our legacy and great employees’ performance.”

unengaged in the process. “Performance reviews are less impactful for great employees if they don’t have items to work on. Instead of focusing on what they did wrong, we focus on the future. Now we use the review process to encourage, retain and stimulate our legacy and great employees’ performance.”

## 6. Divorce Merit Increases from the Review Process

When merit increases are tied to the annual review, employees focus on nothing but the bonus, which can inhibit employees’ growth and limit their ability to focus forward.

Hirst and Parker have untethered merit increases from their performance reviews. Hirst, for example, budgets for the firm in the third quarter, announces raises in the fourth quarter and puts them into effect January 1. “This change puts everyone on the same playing field and allows the employees to focus on performance and not money [for the rest of the year],” says Hirst.

Parker bases merit increases on firm — rather than individual — performance and discusses such increases throughout the year. She doesn’t discuss money during the annual review, which eliminates drama and highlights performance and goal setting.

## PERFORMANCE REVIEWS AS LEADERSHIP TOOL

Current statistics, surveys and interviews indicate that Millennials and members of Gen Z crave feedback and are focused on career development. The once-a-year model is

not going to keep them engaged. When done correctly, a revamped yearlong interactive performance review motivates employees, boosts employee engagement and inspires them to meet the firm’s goals. It also prioritizes employee opportunities and clarifies accountability, while helping leaders learn how to give feedback calmly and helpfully.

“People like to know their relationship to organizational goals and how these impact their future with the company and our revamped [performance management] program facilitates that,” says Boyce.

### ABOUT THE AUTHOR

**Wendy McClellan** is the Founder of Structure for Success, an HR consulting firm working with businesses without an internal HR team to assist them with hiring and employee support services. Her forte is working with leaders who want to elevate their company’s profitability and efficiency. She has been in leadership roles for over 30 years and has taken her corporate knowledge and turned it into a resource for small business owners. She is a Kolbe-certified consultant and an instructor at Arizona State University’s Lodestar Center. Additionally, McClellan serves on the Grand Canyon University Honors College Advisory board in Phoenix, and regularly speaks on leadership, communication, employee support and business development.

 [wendy@structure4success.com](mailto:wendy@structure4success.com)



## Is Your Law Firm Hiring?

Post open staff positions on ALA’s Job Bank to attract qualified candidates with the experience and knowledge you’re looking for.

**Learn more at [alanet.org/careers](http://alanet.org/careers).**

# Litigation Support for the Modern Law Firm

Modern law firms value the practice of law and the business of law. **So do we.**

At **Rapid Legal**, we've expanded the concept of litigation support services to encompass both the practice and business of law by uniquely combining our deep industry knowledge with technology expertise to deliver superior performance and innovative solutions to law firms.

Using Rapid Legal's portal, powered by LegalConnect®, the industry-leading litigation support service management platform, thousands of legal professionals order eFiling, physical court filing, process serving, and more, to be fulfilled for their law firms and clients.

Even better, law firms are customizing how Rapid Legal works for their firm. Whether it's syncing invoicing data directly from Rapid Legal to their financial system, accessing documents from their document management system, leveraging our eFiling APIs to further streamline their firm's electronic filing process, and more, modern law firms are now seeking Rapid Legal's full technology capabilities and partnerships to achieve organizational efficiencies, reduce costs, and free firm resources for higher value work.

That's rethinking litigation support services.

**That's Rapid Legal.**

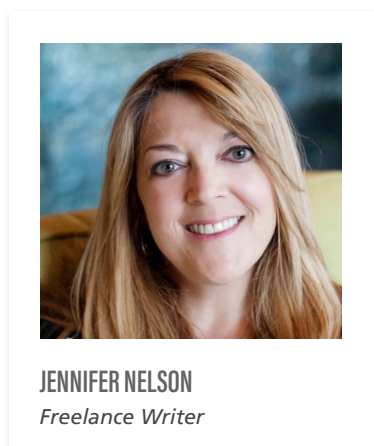
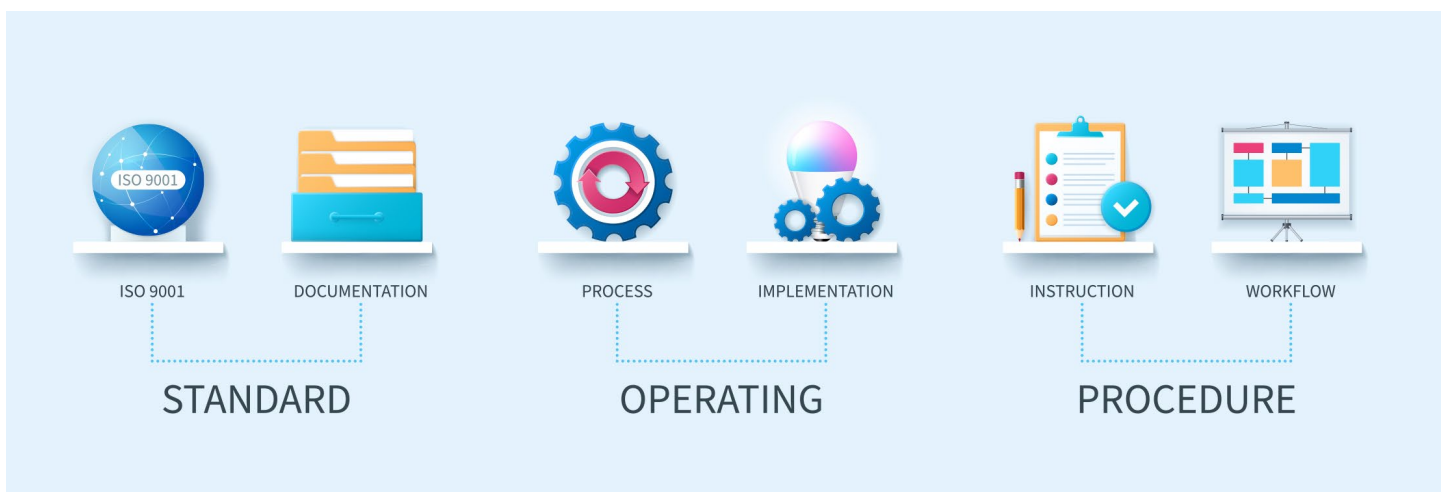


## Our Services:

- eFiling & Physical Filing
- Process Serving
- Document Retrieval
- Concierge Service
- County Recording and More

## Our Technology Platform:

- Powered by LegalConnect, the industry-leading litigation support management platform, certified by courts
- Access documents directly from NetDocuments, iManage and more
- Streamline document workflows, leverage data and do more by connecting your firm's technology systems



“The best SOPs include detailed step-by-step instructions, FAQs addressing the ‘whys’ of the process, and boundaries of what a staff person can do without asking permission from a manager or partner.”

## 5 Steps to a More Efficient Office

*These are the areas to optimize your processes and practice to make positive changes.*

**When you’re looking to run a more efficient law practice, assessing your needs is the first step in making the best possible use of legal management processes. When you consider the tasks your team tackles and pinpoint the areas that can get bogged down, you can see which ones need additional attention.**

“Perhaps your caseload has increased, and you need extra attorneys to handle the steady stream of new business, or possibly you require the assistance of an expert on a particular project,” says Kelley Brubaker, a CPA and business coach in Akron, Ohio, who helps law firms scale profits and become more efficient.

Whatever your circumstances, determining what you require is the first step toward optimizing your processes. Assuming you have a firm grasp on your needs, the next phase is to identify the best places for making a change. “This may necessitate the recruitment of new legal counsel, like lawyers, paralegals or even outside counsel. Finding people [who] will be appropriate for the job and can aid you in accomplishing your objectives is important,” says Brubaker.

Here are just some areas in which a new process can make your practice more efficient.

### 1. DOCUMENT PROCESSES WITH STANDARD OPERATING PROCEDURES

Brubaker requires her clients to document their standard operating procedures (SOPs), from adding a new prospect to their customer relationship management (CRM) database to the entire client intake process. “You never know when someone will be out of the office unexpectedly and we want to ensure the office does not fall apart when key people are unreachable,” she says.

The best SOPs include detailed step-by-step instructions, FAQs addressing the “whys” of the process, and boundaries of what a staff person can do without asking permission from a manager or partner.



## “One area where technology has significantly impacted workflow management is integrating advanced technology tools and software for daily workflows.”

“Empowering staff to make decisions without direct input or oversight from firm partners is the foundation of every efficient law firm,” says Brubaker.

### 2. HOME IN ON CLIENT INTAKE

Brubaker notes the next thing she works with clients on to boost efficiency is client intake. That starts with the right CRM. While any CRM can work, the ones specific to law firms that include case management tools will make office life much easier in the long run.

These systems efficiently gather necessary information, minimize the risk of errors and reduce administrative burdens. By automating this process, legal managers can allocate their time and resources more effectively, focusing on providing high-quality legal services to clients.

For every prospect, it’s critical to gather as much contact information as possible and enter it into the CRM. “I ask that the managing partner define the ‘critical information’ required from prospects. Most firms choose the same contact information such as name, address and phone, but some firms have an established marketing system based either on email or a social media platform,” Brubaker explains. Getting the critical information will allow the firm to place every prospect into the marketing system for automated nurturing.

Having all prospects in your CRM will make the client intake process smoother because there will be less information you need to obtain from clients going forward. You can streamline the client intake process by making one person (plus one backup person) responsible for ensuring all information is entered when the firm retains a new client.

“I have found when there is not a key responsible person at this step, cracks in the process will start to appear,” says Brubaker.

Once you have all pertinent information in your CRM, generating your fee or retainer agreement can be done in minutes, emailed to the new client, and tracked within the CRM for digital client signature and filing. Opening new matters for this client can be accomplished easily afterward.

### 3. EMBRACE ADVANCED TECHNOLOGY TOOLS

Legal managers should leverage cutting-edge software applications designed specifically for law firms to streamline

tasks and enhance efficiency. One area where technology has significantly impacted workflow management is integrating advanced technology tools and software for daily workflows.

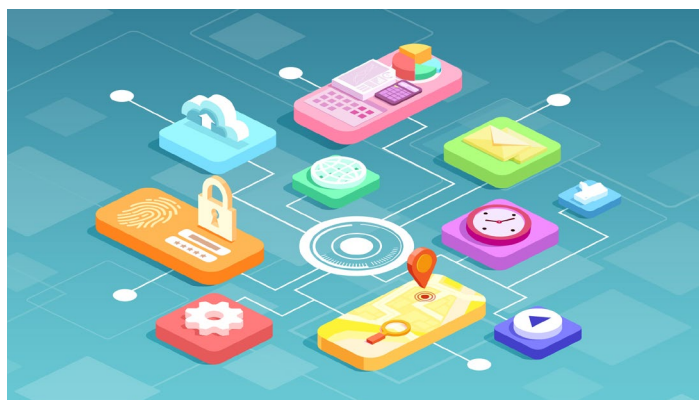
“Legal project management tools allow us to track and allocate tasks, set deadlines and monitor progress in real-time. This not only improves communication and collaboration among team members but also ensures that cases are handled promptly and efficiently,” says Mike Schmidt, Esq., an attorney at Schmidt and Clark. By adopting these tools, legal managers can better allocate resources, manage workloads and identify potential bottlenecks before they become significant issues, he explains.

Collaboration has also been revolutionized by using cloud-based platforms and virtual meeting tools. These technologies enable attorneys to work seamlessly with clients, co-counsel and support staff regardless of their physical location.

Real-time document sharing, instant messaging and videoconferencing all facilitate smooth and effective communication, reduce delays and improve productivity. Collaboration is no longer limited to in-person meetings, allowing for greater flexibility and efficiency in working with multiple parties simultaneously.

Technology has also improved and enhanced efficiencies related to billing. If your firm isn’t billing electronically, moving to this format can simplify invoicing and reduce the time spent on manual data entry and paperwork.

“These systems integrate with case management software, allowing for accurate and timely recording of billable hours and expenses. Clients can receive invoices electronically, making payment processes more convenient and expediting the overall billing cycle,” says Schmidt.



## 4. HARNESS AI-DRIVEN E-DISCOVERY

Like most other industries, law firms are also finding ways to harness artificial intelligence (AI) to improve processes and speed things up.

“Something that my firm has adopted is AI-driven e-discovery. These days, there is rarely any case that doesn’t involve some aspect of the plaintiff’s/defendant’s digital footprint,” says Ben Michael, Esq., an attorney at M&A Criminal Defense Attorneys. “Without the help of AI, e-discovery investigations can’t be completed as efficiently. When you can’t do that, you’re not representing your client as best as you can.”

In addition, AI can process massive amounts of text to look for relevant legislation, case law and precedent.

“Even in cases where these systems can’t go so far as to recognize patterns or suggest a legal strategy, they can at least flag relevant documents for further review by paralegals. This has been extremely useful for my team when we are extra busy or short-handed and need that extra help — and truthfully, it’s helpful even when we aren’t as pressed,” says Michael.

## 5. DON’T DISCOUNT OFFICE DESIGN

Finally, law offices often sport a nonfunctional design layout like squeezing past file cabinets on your way to the copier,

bad lighting or “meh” furnishings. While you might not think office design affects efficiency, changes like making shared equipment more accessible and creating collaborative workspaces that match the needs of the attorneys and staff, instead of walled-off corner offices can improve collaboration.

Cloud-based storage, pops of color and comfortable chairs are shown to decrease the need for time off and shorten breaks, notes Cain Elliott, PhD, Head Legal Futurist and Senior Vice President at Filevine.

## ON YOUR WAY TO EFFICIENCY

As firms continue to struggle with hiring and retention, improving the way staff works shouldn’t be overlooked. Creating a smoother-running, more efficient office and implementing some of these processes can help your practice streamline workflows — and make life easier for everyone.

### ABOUT THE AUTHOR

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

 [linkedin.com/in/byjennifernelson](https://www.linkedin.com/in/byjennifernelson)



 **2023**

**Join ALA for An Upcoming Webinar and Earn CLM, HRCI or SHRM Credits**

 **SEPTEMBER 13**  
Collaborative Work Tools in the Hybrid Environment

 **SEPTEMBER 27**  
Proactive Steps to Effective Strategy Development

For more information and to register, visit [alanet.org/webinars](https://alanet.org/webinars).

 **ALA**  
Association of Legal Administrators

# “I love paperwork!”



(said no one, ever.)

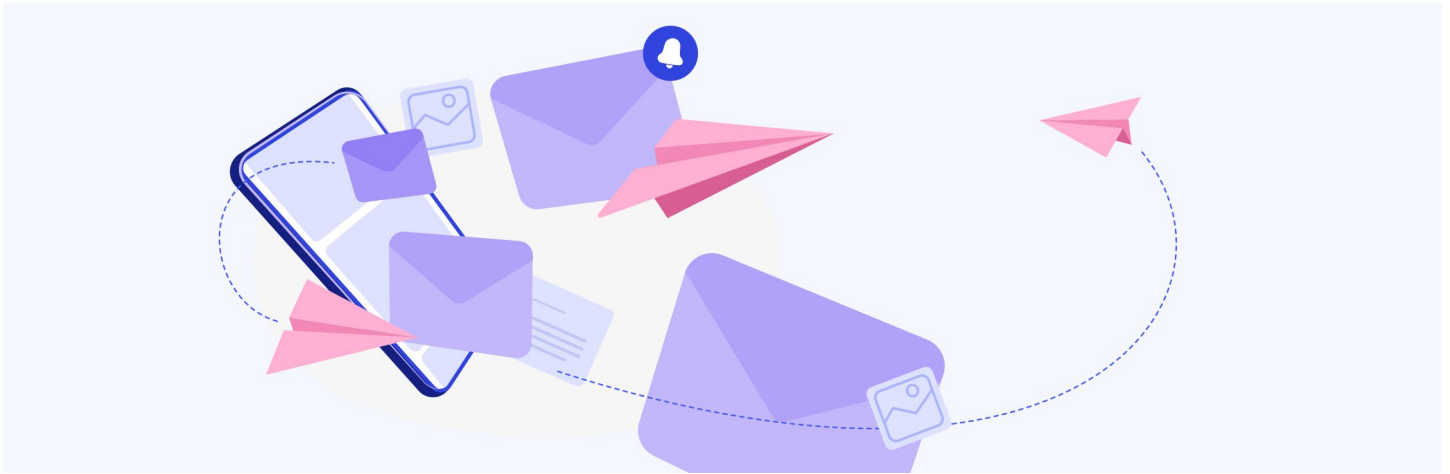
Tabs3 Software anticipates the needs of today's modern law firms with continued innovation. Thanks to decades of experience partnering with our clients, you don't have to put up with annoying workarounds or duplicate data entry where other legal software falls short.

You can automate tasks, streamline complex billing, implement paperless invoicing, accept credit card and ACH payments with Tabs3Pay, and more. If you ever need help, our outstanding support team is just a call or email away. **Sign up for a personal demo today.**

Learn more or schedule a demo:  
[Tabs3.com/ALA](https://www.tabs3.com/ALA)



Billing | Practice Management | Accounting



**ROSS FISHMAN, JD**  
Chief Executive Officer  
Fishman Marketing

## 9 Quick Tips for Writing Content that Gets Read

**Law firms regularly send out blog posts and alerts, but few readers make it past the first paragraph. In general, good marketing writing causes the reader to notice your material, feel compelled to read it, then act on it.**

Remember, the goal of marketing communication isn't to send something — it's to make money. Sure, it can also help build trust, support your brand and start a conversation, but let's start by trying to generate business.

Here are nine quick tips that will increase the value, impact and reader engagement of whatever you send.

“Internet readers want one page, max. Offer simple, practical advice to help them save money, stay out of trouble or do their job better and they'll look forward to your next alert.”

### 1. Write like *People* magazine, not a treatise.

Even sophisticated readers prefer a light skim to a dense slog. Use short sentences, short paragraphs, small words, colloquial language, and no legalese or jargon. Write like you're explaining the issue to a smart middle schooler. You'll have happier, more engaged readers.

### 2. Keep it short.

Internet readers want one page, max. Offer simple, practical advice to help them save money, stay out of trouble or do their job better and they'll look forward to your next alert. Write your preferred version, then cut it by 75%. Your readers will appreciate it. If they want more, they'll contact you and ask. And that's what we want to happen.

### 3. Grab them with a simple headline.

Your alert is an interruption in their busy day. Capture their attention and imagination with a short, bold, useful headline. Popular clients may get 100+ emails per day plus 50 other law firm alerts and newsletters. Your headline and subject line must compel them to stop what they're doing immediately and read your material.



## 4. Get to the point.

If you don't grab them in the first sentence, they won't read the second one. Begin by telling them precisely what you're writing about and why they should care. Make the first sentence so simple, clear and powerful that readers exclaim, "Hey, this looks really useful — I want to keep reading!" If you open by talking about yourself and your experience, or providing general background information regarding the topic, you've lost them.

## 5. Provide analysis, not information.

Don't simply repeat or summarize the events — tell them what to do about it. Our target clients can obtain the basic facts about a new court decision or piece of legislation more quickly and thoroughly from a major news source. As the legal experts, we must provide specific, actionable advice. Don't regurgitate the news — tell them specifically what they should do about it, and they'll look forward to your next article.

## 6. Omit case names, citations and lengthy court names.

Case citations and other legal jargon are a visual wall. Lay readers will immediately stop reading or begin skimming. Unless you have a referral-based specialty practice where your targets are other lawyers, your readers don't need the official case names or citations, or the lengthy formal name of the court or district it's in. If you feel you absolutely must include this stuff, bury it at the bottom.

## 7. ChatGPT is fine but dull.

Artificial intelligence (AI) platforms like ChatGPT can be a useful way to create that first draft, but the writing I've seen is pretty tedious. It's just OK, and OK doesn't cut through the clutter. So, sure, use ChatGPT as a start, but make sure you spruce it up until it sings.

## 8. Avoid obvious self-promotion.

No one's going to volunteer to read your advertorial. You're not going to persuade them that you're smart by talking about yourself, but rather by showing your mastery of the subject. Focus the blog post or alert on helping them solve their problems. Busy professionals rarely choose to watch an infomercial or read a brochure; as soon as they discover it's all about you, they'll stop reading.



## 9. General topics build your brand. Specificity gets you hired.





If I'm writing in order to get hired, at some point I need my audience to think the following, in this precise sequence:

- » "Hey, that's a great idea! I never thought of that!"
- » "He's right, I should do that!"
- » "Hmm, I don't know how to do that."
- » "I wonder who knows how to do that?"
- » "Hey, that guy knows how to do that!"
- » "I think I'll contact him."

That is, by educating your audience in just the right way, you can use the article or presentation to create a need they didn't realize that they had, where you're the obvious solution. People like learning new things, but there's a clear line — if they ever feel like you're trying to sell them something, they'll resent it. It's a fine line between education and sales, but it's possible. And it's worth it.

### 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 ALA member firms dominate their markets. A Kentucky Colonel (like Col. Sanders), Fishman was the first inductee into the Legal Marketing Association's Hall of Fame, and recently negotiated the safe end of a 12-hour armed police standoff. (No, really!) He's written 10 books on marketing, all of which are available on Amazon.

-  [ross@fishmanmarketing.com](mailto:ross@fishmanmarketing.com)
-  [fishmanmarketing.com](http://fishmanmarketing.com)
-  [twitter.com/rossfishman](https://twitter.com/rossfishman)
-  [linkedin.com/in/rossfishman](https://linkedin.com/in/rossfishman)

# Discover More About These Upcoming ALA Conferences!



There's **still time** to join us!



USE CODE:  
B00-690-692AX10

**INTELLECTUAL PROPERTY  
CONFERENCE FOR LEGAL  
MANAGEMENT PROFESSIONALS**

**SEPTEMBER 21-22**  
Omni Parker House Hotel | Boston, Massachusetts



USE CODE:  
B00-690-691AX10

**EXECUTIVE  
LEADERSHIP SUMMIT**

**SEPTEMBER 28-30**  
Hilton San Diego Gaslamp Quarter | San Diego, California



USE CODE:  
B00-690-694AX10

**LEGAL  
MANAGEMENT  
FUNDAMENTALS**  
Navigating Your First Five Years

**OCTOBER 13-14**  
Omni Parker House Hotel | Boston, Massachusetts



SAVE THE DATE

discover the  
**difference**

**ALA's 2024 Annual  
Conference & Expo**

**MAY 19-22**  
Gaylord Rockies Resort & Convention Center | Aurora, Colorado



Scan or visit [alanet.org/events/register-now](https://alanet.org/events/register-now) for more information.



**NICOLE BLACK**

Head of SME and External  
Education  
MyCase

## Artificial Intelligence and ChatGPT in Legal Practice: Navigating the Pros and Cons

**There's a reason tools like ChatGPT, Bing Chat and Google Bard are on the radar of the majority of legal professionals: Generative artificial intelligence (AI) has the potential to transform the legal industry and usher in a new era of AI-powered legal workflows.**

In fact, according to a recent report from Lexis Nexis, 86% of legal professionals are aware of generative AI and more than a third of lawyers have used it either personally or professionally.

These technologies will undoubtedly impact the way legal professionals get work done in the months and years to come. However, in their current form, they also present significant implementation challenges.

Generative AI tools like ChatGPT are AI-powered chatbots that provide human-like responses to natural language queries. These tools can understand and respond to a wide range of questions and serve up near-instantaneous responses.

ChatGPT can increase overall law firm efficiency and the quality of legal work. It can be used for a variety of tasks including legal research, document drafting, trial preparation and law firm management. It's available as a standalone chatbot, and a free version is available. After test-driving it, you may want to sign up for ChatGPT Plus, which costs \$20/month and offers consistent uptime and prioritized access to new features, including access to GPT4. Many legal technology companies are also incorporating generative pretraining transformer (GPT) technology into their platforms as well.

“If you don't take steps to learn about and incorporate these tools into your law practice, rest assured, your competitors will.”



## HOW CAN LAWYERS USE CHATGPT?

There are many ways lawyers and legal professionals can use generative AI as part of their daily workflow. Use cases are varied, and include:

- » **Summarizing transcripts:** Enter text from a transcript and request a summary.
- » **Drafting sample agreements like nondisclosure agreements:** ChatGPT will often provide a draft that is a good starting point from which you can craft a robust document.
- » **Preparing for direct or cross-examination:** Specify the issues unique to your case and use the resulting questions as food for thought when crafting your direct or cross-examination of a witness.
- » **Crafting voir dire:** Your query should identify the type of case and an issue you'd like to explore during voir dire. Use the resulting output to draft questions for the jury panel.
- » **Client intake forms:** Submit a request for the creation of forms for specific types of cases and modify the results to suit your needs.
- » **Retainer agreement:** Identify key clauses and concepts you'd like included and update the form provided to include information specific to your firm and the client's case.
- » **Letters to clients:** Draft opening and closing letters for different types of cases and create templates that can be easily replicated across matters.

## ASSESSING THE BENEFITS AND RISKS

These tools are very versatile and have the potential to enhance a wide range of legal technology products. The benefits of using generative AI are evident, but there are also drawbacks that should be top of mind.

First, ChatGPT can sometimes provide inaccurate or misleading information, a phenomenon that is referred to as hallucinations. Because available generative AI tools continue to provide responses that include inaccuracies and flat-out falsehoods, it's critical to have adequate foundational knowledge about all topics you plan to ask about. Once you've received a response to your inquiry, you'll need to carefully review all answers provided so that you can identify any errors in the output. Plus, as of publication, ChatGPT is only trained in info through September 2021, so anything that's happened since then won't be included.

Second, when using generative AI tools, always keep client confidentiality top of mind. It's imperative that you fully



understand how all data queries are handled and who has access to them. If you are unable to adjust the product's privacy settings to reduce or eliminate data sharing for product improvement purposes or otherwise, you'll need to refrain from including any confidential client information when submitting queries to the chatbot.

Finally, in addition to being vigilant about confidentiality, it's important to maintain technology competence by ensuring that you understand both the capabilities and limitations of any AI tools you use in your practice. Lawyers must also supervise all third parties working on a matter, including the work produced by AI. It's crucial to ensure that all work produced meets the standards required of legal professionals and is free from mistakes or inaccuracies.

## LOOKING TO THE FUTURE

Despite its current shortcomings, generative AI tools like ChatGPT have the potential to significantly enhance efficiency in the delivery of legal services and reduce the common frictions encountered in the practice of law. As AI technologies like ChatGPT continue to evolve, their accuracy and utility will undoubtedly increase.

Legal professionals who embrace these tools and learn to use them effectively and ethically will be well-positioned to harness their power to improve their practices and better serve their clients. If you don't take steps to learn about and incorporate these tools into your law practice, rest assured, your competitors will.





## Still Curious About ChatGPT and Other Automation Tools?

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](https://alanet.org/podcasts).

## ABOUT THE AUTHORS

**Nicole Black** is the Head of SME and External Education at MyCase legal practice management software, an AffiniPay company. A Rochester, New York attorney, author, journalist, she's a nationally recognized author of *Cloud Computing for Lawyers* and co-author of *Social Media for Lawyers: The Next Frontier*, both published by the American Bar Association. She also co-authored *Criminal Law in New York*, a Thomson Reuters treatise. She writes regular columns for *Above the Law*, *ABA Journal* and *The Daily Record*, has authored hundreds of articles for other publications, and regularly speaks at conferences regarding the intersection of law and emerging technologies. She is an ABA Legal Rebel, and is listed on the Fastcase 50 and ABA LTRC Women in Legal Tech.

 [niki.black@mycase.com](mailto:niki.black@mycase.com)

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

# BECOME a Certified Legal Manager (CLM)<sup>®</sup>






Regardless of the stage in your career, certification adds a valuable dimension to your professional development. Earn your certification to demonstrate you have mastered the knowledge, skills and abilities to operate a high level of expertise in the field of legal management.

**In 2023, the exam dates are:**



**November 14–20 — apply by September 15!**

ALA offers various ways to help you prepare and improve your chances of successfully passing the exam and earning your CLM:

-  The downloadable *Study Guide for the CLM Exam*
-  The CLM e-learning supplement, containing four courses covering the most challenging content
-  Packaged books and materials for background knowledge
-  Study groups with your peers
-  Virtual CLM trivia events

CLM<sup>®</sup>



[alanet.org/clm](https://alanet.org/clm)



**RAQUEL GOMES**

Founder  
Stafi

## The Secret to Scaling Your Law Firm? Hire Virtual Legal Assistants

**Hiring a qualified assistant can make or break a law firm's ability to thrive amid a period of exciting growth. In a business's cycle, there is a certain point where the growth means it is no longer sustainable for the business leader to run everything.**

Law firms can and should avoid getting to this point by getting the necessary help from legal assistants. One Gallup poll shows that leaders who successfully delegate responsibilities generated 33% more revenue. While one can hire in-person assistants, there's also a modern alternative: hiring qualified virtual assistants.

“By allowing yourself to recruit internationally, you are opening your doors to a wealth of unique perspectives and experiences who could bring something entirely different to the table than a U.S.-based employee.”

The COVID-19 pandemic introduced us to the limitless potential of remote workers. Although remote work was expanded out of necessity, it has stuck around thanks to the benefits it provides to both businesses and employees. Many employees prefer working remotely because it allows them to work on their own terms, which helps them be happier in the workplace and benefits the business in turn. A study showed that employees who are allowed to work remotely can be 13% more productive than their in-office counterparts.

One of the biggest benefits of turning to a remote workforce — as opposed to limiting one's business to the local talent pool — is the ability to globalize. By allowing yourself to recruit internationally, you are opening your doors to employees with a wealth of unique perspectives and experiences who could bring something entirely different to the table than a U.S.-based employee. For example, many international remote workers are bilingual or multilingual, which can be a valuable skill for businesses to have in their arsenal.

### FINDING THE RIGHT VIRTUAL ASSISTANT

Hiring the right candidates is time-consuming — but how you do so is just as important as where you look. You could end up with a ton of resumes from unqualified people and just a few solid ones. While opening the door to remote workers offers the opportunity

to recruit all sorts of people you'd never have been able to reach before, it also means there will be a drastic increase in applications. Employers must be willing to sort through those applications to find the right people to hire.

Particularly when working in the law space, it's important to realize that not just anyone has what it takes to be an assistant. Legal work is difficult and emotionally taxing, and legal managers must look for someone to assist them who can handle these uniquely stressful situations. One of the biggest myths of hiring virtual assistants is that they can only complete certain mundane tasks. The reality of virtual assistants in the modern day is that they can come with skill sets that allow them to perform all sorts of duties — from correspondence with clients to data entry, customer support and everything in between.

When a lawyer delegates these tasks to a virtual assistant, they have more time to spend on tasks that will enable them to grow and improve their firm. The fundamental duty of lawyers and the firm staff is to serve their clients. Although administrative tasks are certainly an important part of the client relations experience, what matters most is how the lawyer handles the case. A proficient virtual assistant handling administrative tasks can allow a lawyer to pay better attention to their clients' cases.

Hiring virtual assistants to handle these administrative tasks has significant benefits to the firm, from increasing productivity to increasing performance. According to one study, some businesses that hired virtual assistants reported **saving as much as 78% on operating costs per year**. For businesses scaling — especially law firms — these savings can be reinvested to help the company grow.

It's also a great way for lawyers to delegate responsibilities to set themselves up for success when growing their business. Virtual assistants these days are more capable than ever before, with unique, global perspectives and skill sets that allow them to complete a wide range of administrative tasks. Growth should be an exciting time for any business, and hiring virtual assistants can help lawyers take their business to the next level.

**ABOUT THE AUTHOR**

**Raquel Gomes** is the Founder of Stafi, a virtual assistant company. She's passionate about helping business owners — especially women entrepreneurs — understand that they can, in fact, have it all — a successful business, time with loved ones and the freedom to pursue the things that matter most. But she knows to have it all, you can't do it all. That's why she founded Stafi. Originally from the south of Brazil, Gomes is a licensed psychologist with an MBA in International Business.

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



 LEGAL MANAGEMENT TALK

## Listen to Learn

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

ALA'S LATEST PODCAST LINEUP

-  **Clearing Up the Cloud** with Amy Kosey
-  **A Peek Around the Corner** with PDAC: **Recession-Proofing Your Firm**
-  **Harnessing Data for Business Development** with Ioana Good, Adrien Maines and Peter Johnson
-  **Building an Inclusive Workplace** with Terry Isner

Each episode is **free** and usually **fewer than 25 minutes long!** [alanet.org/podcast](https://alanet.org/podcast)



# Anniversaries, Awards and Appointments

## Members on the Move »



**Jennifer Javaheri**, a member of the Greater Los Angeles Chapter, is now Senior Office Administrator at McGuireWoods LLP in Los Angeles, California.



**Rachelle Jones**, a member of the Mile High Chapter, is now Office Administrator for Denver and Indianapolis at Littler Mendelson, PC, in Denver, Colorado.



**Stephanie Nguyen Phan**, an Independent member, is now Office Administrator at Littler Mendelson, PC, in Houston, Texas.



## Sending Our Condolences

ALA is saddened by the recent passing of Joan Wean, who was an ALA member for 30 years and was actively involved in the Independence Chapter. She served as Chapter President from 1997–1998, chaired the chapter’s Membership Committee and was honored with ALA’s Outstanding Association Volunteer Award in 2005. We send our condolences to her family, friends and colleagues.

## Discover Your Online Community

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

- Video meetings
- Direct messaging
- Polling
- Trackable content tags

[community.alanet.org](https://community.alanet.org)





# What's Happening at Headquarters

## Calling All Early-Career Administrators! This Conference Is for You

ALA's Legal Management Fundamentals Conference is back for a second year. This is a must-attend program for those in the first five years of their legal management career.

You'll be with like-minded peers from across the country as you learn through 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 colleagues!

Doesn't sound like a fit for you? Send this to a colleague who could benefit! Register now to attend on October 13–14 at the Omni Parker House Hotel in Boston, Massachusetts. Visit [alanet.org/lmf2023](http://alanet.org/lmf2023) for more information.



**DISCOUNT**

## Receive Member Discounts from National Purchasing Partners

ALA has partnered with National Purchasing Partners (NPP) to offer member discounts for business solutions ranging from software to travel to internet services. Visit [alanet.org/member-discounts](http://alanet.org/member-discounts) to learn more about NPP's offerings and register your firm.

## Learn About Strategy Development at ALA's Next Webinar

Effective strategy development can't begin with "the way we've always done it." The first steps in any journey forward begin with careful planning and analysis before starting out. The resulting actions need to be specific and measurable.

This interactive and relatable session will explore the intentional, proactive steps that every legal professional can take to effectively develop strategies to become less reactive. Join Affinity Managing Partner Debbie Foster as she shares her three keys to developing strategies that will help your law firm achieve lasting success. Visit [alanet.org/upcoming-webinars](http://alanet.org/upcoming-webinars) to register.



**WEBINAR**

## 2022 ALA Financial Statement

At ALA, we continue to work to make the most efficient and impactful use of our financial and human resources. ALA's Board of Directors and staff are continuously exploring and identifying opportunities to improve efficiencies and optimize results. In 2022, our overall revenue was \$6.37 million and expenses were \$6.16 million, resulting in a net gain of \$131,373. To read the full statement, see below.

As we head into the second half of 2023, we remain focused on elevating your membership experience and refocusing our efforts to meet the challenges you face as legal management professionals.

The Board of Directors is currently working on the Strategic Plan, which begins in 2024. This will set the goals we will be working toward. We look forward to working with the entire ALA community — members, business partners, chapters and other leaders in the business of law — to achieve these goals and navigate the ever-changing legal landscape together.

### ASSOCIATION OF LEGAL ADMINISTRATORS AND AFFILIATE CONSOLIDATING SCHEDULE OF ACTIVITIES FOR THE YEAR ENDED DECEMBER 31, 2022

	Association of Legal Administrators	The Foundation of the Association of Legal Administrators	Eliminations	Total
<b>Revenue and Support</b>				
Dues	\$ 2,600,225	-	-	\$ 2,600,225
Annual Conference	2,584,941	-	(2,798)	2,582,143
Advertising	224,400	-	-	224,400
Job Bank	329,639	-	-	329,639
Education	43,538	-	-	43,538
Publications and Other Materials	404,175	-	-	404,175
Contributions	-	50,267	-	50,267
Donated Services	-	19,065	(19,065)	-
Fundraising Income	-	19,153	-	19,153
Other	120,793	-	-	120,793
Net Investment Income	32,025	108	-	32,133
Realized Loss on Investments	(670)	-	-	(670)
Unrealized Loss on Investments	(38,424)	-	-	(38,424)
<b>Total Revenue and Support</b>	<b>6,300,642</b>	<b>88,593</b>	<b>(21,863)</b>	<b>6,367,372</b>
<b>Expenses</b>				
Program Services	3,165,155	33,994	(2,798)	3,196,351
Management and General	2,957,299	22,598	(19,065)	2,960,832
Fundraising	8,205	-	-	8,205
<b>Total Expenses</b>	<b>6,130,659</b>	<b>56,592</b>	<b>(21,863)</b>	<b>6,165,388</b>
<b>Change in Net Assets without Donor Restrictions</b>	<b>169,983</b>	<b>32,001</b>	<b>-</b>	<b>201,984</b>
<b>Net Assets without Donor Restrictions, beginning of year</b>	<b>1,953,315</b>	<b>71,127</b>	<b>-</b>	<b>2,024,442</b>
<b>Net Assets without Donor Restrictions, end of year</b>	<b>\$ 2,123,298</b>	<b>\$ 103,128</b>	<b>-</b>	<b>\$ 2,226,426</b>