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EMPOWERING WOMEN IN THE WORKPLACE

A woman's guide to making sure her voice is heard in the office — and tips for how men can help.





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OLIVER YANDLE, JD, CAE
*Executive Director, Association of
Legal Administrators*

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We look forward to sharing the results of these studies with you, as we continue to advance our strategic goal of being a thought leader in the legal industry.”

Help Provide Data to Better Understand Harassment and Information Management in Firms

Last month, *Time* magazine named “The Silence Breakers” as their 2017 Person(s) of the Year — people, mostly women — who came forward to report sexual misconduct and fueled an international, and long overdue, conversation about sexual harassment and assault. I have been amazed by the courage and strength shown by those who have come forward.

The #MeToo movement shed light on shocking stories of harassment, abuse and, in some cases, criminal behavior. While much of the attention has focused on the entertainment, media and political realms, it’s clear that the problem extends across every facet of business and industry, including ours.

In 1992, the American Bar Association implemented a policy to provide leadership and education in an effort to eradicate sexual harassment in the profession. While the policy has had some success, the problem persists.

This month, ALA is partnering with Elizabeth L. Mell of Mell Consulting, LLC and Ian Meklinsky, Chair of the Employment Practice at Fox Rothschild, on a survey of law firm practices, policies and perspectives on the issue of sexual harassment. No law firm or individual names will be collected. However, we hope the results will reveal firms’ awareness and willingness to address the issue, the kinds of policies and programs currently in place, and the risks and benefits of those policies and programs.

We hope you will consider participating in this important research. And be sure to read this month’s cover story, “Empowering Women in the Workplace,” that shares insight on how

women can be heard better in the workplace, and what men can do to be their allies.

ALA is also working on another research project, one designed to better understand the barriers to and benefits of managing law firm information as a business asset. While effective management of financial and physical assets is important, the most critical assets law firms have are their people and the data, information, and knowledge they need to do their jobs.

Every aspect of effective legal service delivery has an information management component: customer access, relationships and service; matter scoping and planning; proposal pricing; business and professional decision-making; firm competitiveness; risk management; service delivery; and business location and behavior. Successful firms understand the importance of effectively managing information to increase revenue, drive down costs, manage risk, improve competitiveness and, ultimately, increase profitability.

In partnership with the University of South Australia and Experience Matters, an information management consulting firm, ALA will be distributing a short survey to law firms about their current information management practices. Survey participants will receive insights into how well

their firm is currently managing its information assets, the impact those assets are having on the business, high-level recommendations for improvements, and benchmarks against industry peers.

We hope you will also consider participating in this study, as the results could have tremendous impacts on your bottom line. One firm in Australia found that with improved information asset management, 70 percent of its fee earners could bill an extra 30 minutes per day. Another 20 percent could bill at least another hour per day. That adds up to as much as an additional \$2 million in revenue per year. In today's increasingly competitive legal landscape, those findings matter.

We look forward to sharing the results of these two important studies with you in the coming months, as we continue to advance our strategic goal of being a thought leader in the legal industry.

Best wishes for a happy, healthy and successful 2018! ■



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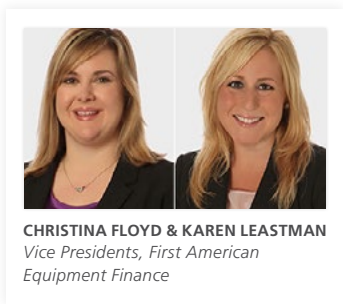
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3 Practical Options for Financing Your Office Build-Out

A fresh start is always exciting. But paying for that fresh start can put a damper on the dream. Understand your finance options so you can select the approach that makes the most fiscal and practical sense for your next office improvement project.

“
Few projects are as thrilling — or as daunting — as managing an office build-out.”

Whether your current office simply needs a face-lift or it's finally time to move to a bigger space, few projects are as thrilling — or as daunting — as managing an office build-out. Not only must you deal with a never-ending stream of contractors, suppliers and invoices, you must also figure out how your firm will actually pay for all those gorgeous new desks and that fancy new lobby.

Luckily, you have options. Although build-outs may be complicated projects, financing these projects can be more straightforward than you think. Typically, your finance options will boil down to three approaches.

BANK LOAN OR LINE OF CREDIT

This is perhaps the most common finance solution. If your firm has a good bank relationship, obtaining bank financing may be a straightforward, easy process.

Keep in mind, though, that many banks will not loan against soft costs, such as construction services or software — meaning your firm may need to cover those costs in some other way. Additionally, tapping into a line of credit for a build-out may prevent you from accessing that line for other, more critical working capital needs.

TENANT IMPROVEMENT (TI) ALLOWANCE

In some situations, landlords will add a TI allowance to the rental agreement to sweeten the deal. Expressed as a lump sum or per-square-foot amount, it can be used to renovate or retrofit the leased space. However, a TI allowance may not be sufficient to cover all of your build-out expenses. The allowance may also be stipulated for certain project costs such as construction but not furniture.

LEASE LINE OF CREDIT

For many firms, a lease line of credit can solve many of the issues with traditional bank financing and TI allowances, including:

- **Ability to finance 100 percent of a project's costs.** A lease line of credit can include all expenses related to the build-out, including both hard and soft costs. Build-out expenses such as architectural fees, construction, wiring and cabling, audio-visual setup and carpeting can all be included in a lease along with furniture and fixtures.
- **Reduction in the tax burden.** Lease payments are recorded on your income statement, which means they are tax-deductible operating expenses. This can reduce your firm's tax expenses far more than the depreciation expenses you would claim if you booked your new equipment purchases as assets on your balance sheet.
- **Diversification of funding sources.** Traditional bank financing may include covenants that limit your ability to add new liabilities to your balance sheet. A lease line of credit avoids those covenants and provides you with off-balance-sheet financing. Leasing will also prevent your firm from becoming too dependent on any single source of funds, which can ensure stability and peace of mind in an unpredictable finance environment.
- **Distribution of costs over time.** Your firm's employees will realize the benefits of your office build-out for years to come, so why should your equity partners shoulder 100 percent of the costs today? Leasing provides you a fixed-rate financing arrangement where you can spread the build-out costs over a five- to eight-year period. Particularly for large projects and expensive equipment upgrades, this may be a smarter long-term approach.
- **Prevention of phantom income.** With traditional financing, the tax depreciation of office improvements is typically less than the cash expense. This creates a higher taxable income compared to book income, which means your equity partners will be taxed at a higher level. A lease program eliminates this phantom income drag.

As you weigh your finance options, ask yourself these questions:

1. What is the overall cost of our build-out and how much does the TI allowance cover?
2. How long of a financing arrangement would make sense?
3. Would the firm be depreciating the assets for longer than the occupancy of the space?
4. Would spreading out the cash flows of the acquisition make sense?
5. Would easing the equity partners' tax burden be an important factor to consider?

You have many options, so take the time to select the approach that provides your firm with the most advantages over the long term. And be sure to sit back and enjoy your beautiful new space. You've earned it! ■

ABOUT THE AUTHOR

Christina Floyd is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully completed the Legal Management Finance Specialist Certificate Program through ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 200 firms.

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

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FUNDING YOUR OFFICE RENOVATION, RELOCATION OR REMODEL

Join Christina Floyd and Karen Leastman at ALA's Annual Conference & Expo this May in National Harbor, Maryland, as they expand on this subject matter. Visit alanet.org/conf18 for more details. They also recently joined us to discuss this topic on *Legal Management Talk*. Download through your podcast app, or listen here: alanet.org/education/online-learning/podcasts.



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The insurance company's coverage of these major costs has helped the firm spend their own time and resources on working with their clients during this time of crisis.”

Law Firms Under Cyber Siege: 5 Lessons for 2018

It's no secret that in the law firm world, we are under siege. From hackers to regular crypto-attacks, law firms across the country are feeling the pain from cyber events. Most of the headlines, understandably, cover the fallout from such occurrences at the largest firms. However, small and midsize firms are much more susceptible to damage from cyberattacks because of lower IT budgets and smaller cash reserves to withstand, at a minimum, significant financial losses.

These are five hard lessons that our clients learned in the past year that can help you improve your systems before you are attacked.

- 1. Even a no-name firm's business can be interrupted.** One small firm felt (correctly) that it was not a target. They do general practice work (litigation, corporate advice, real estate, etc.) and serve small and midsize companies and their executives. But the firm was attacked by a tech robot from Asia, leaving the firm unable to access their systems for three days. It doesn't appear that the firm was specifically targeted; it was merely one of the millions of companies attacked every day. Its clients were inconvenienced by the slowdown in work product, and some of them had to be told that their private data may have been stolen.
- 2. Bad internal communication can hurt you in times of crisis.** When there is a cyber incident — especially one that affects all firm employees — it is critical to act fast in a unified manner. Our client didn't have all employee contact information in a second location outside the firm network. When the network was compromised and determined to be off limits, it was difficult to communicate with all employees with proper instructions regarding work location and which services could be used. The firm now has a cyber response plan that includes all employee contact information and important

vendors to limit business downtime when there's a cyber crisis.

3. Poor IT standards hurt during reboots. During a recent firm-wide rebuild of their systems following a cyber event, one of our clients was delayed because their lawyers had a bad habit of storing their emails in their inbox for years. Each lawyer had tens of thousands of emails, making the rebuild process much longer than it needed to be.

4. Loose IT permissions can be your Achilles' heel. A firm's entire system was breached because it erroneously allowed each attorney who was logging in remotely to adjust their own security settings. No one likes extra, time-consuming security steps, but once the firm decides to implement security protocols, IT must "hardwire" the software systems to only follow those rules.

5. Insurance coverage can make a big impact during claim time. A client recently improved their cyber coverage to include business interruption and a robust rebuild reimbursement just two months before a major cyber event hit their firm. The full financial impact is still being evaluated, but the firm is very happy knowing that at least the coverage will be there. The insurance company's coverage of these major costs has helped the

firm spend time and resources on working with their clients during this time of crisis.

The effect of cyber claims on law firms is just starting to be realized. Your IT consultant may very well be terrific and you may be investing in technological protection, but the "bad guys" are pretty smart and becoming more aggressive every year. It is not a question of *if* you will be impacted, but *when*. By taking these lessons to heart, you can learn from the mistakes of other firms. A good audit of your cyber hygiene and training schedule — and working with an insurance broker who understands cyber coverage for law firms — can make all the difference. ■

ABOUT THE AUTHOR

Uri Gutfreund is the National Law Firm Practice Leader for Risk Strategies Company, a national top 25 insurance broker. He and his multidisciplinary team advise law firms on all types of insurance and benefits. Gutfreund is a frequent speaker at legal conferences, and a writer and blogger on insurance and risk management.



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Facts and Stats



DID YOU KNOW?

Two decades ago, about **14 percent** of law firm partners were women. Today, the number has only risen to **22 percent**. However, in the intervening years, the share of law school graduates who are women has soared to just more than **50 percent**, according to Law360's 2017 Glass Ceiling Report.

Read more in this month's CM feature, "Empowering Women in the Workplace."

SHOULD LEGAL MANAGERS BE WORRIED ABOUT THEIR LAWYERS' TECH ATTITUDES?

The *ABA TECHREPORT* comprises 10 articles by legal industry experts on topics ranging from technology training to social media. Much of the content is derived from a 2017 survey of ABA members.

- **83 percent** of respondents said training on their firm's technology is "very important" or "somewhat important," but **17 percent** said it was "not very important" or "not at all important" — indeed, solo and small firm practitioners were more likely to have this opinion
- **60 percent** of firms budget for technology; solo and small firms lag well behind, with **58 percent** of solo lawyers and **40 percent** of small firms **not** budgeting for tech
- **22 percent** of firms have experienced data breach at some point (the highest incidence rate was for firms with 10-49 attorneys), yet **25 percent** have no data security policy
- Only **42 percent** of those surveyed work at firms with a written policy about mobile device use for firm work

To view the full report, see the web version of this article.

PREDICTIONS FOR THE LEGAL INDUSTRY IN 2018

- Firms will shift to positive action, *improving* engagement rather than reducing attrition among associates — particularly through inclusion in such decision-making bodies as practice groups, says Zach Mayer, Director of Kane Russell Coleman Logan, PC
- Blockchain technology will enable "smart" contracts — that is, agreements that are self-executing and self-enforcing, says Derek Brost, Director of Engineering for Bluelock
- Automated workflows and secure client-communication portals will increase transparency and decrease costs, especially for administrative work, says Haley Altman, Chief Executive Officer (CEO) of Doxly
- Artificial intelligence will not only become a workforce tool but also an area of legal practice, as the courts sort out regulations and whether the AI programmer or the user is liable when things go wrong, says Jeff Ton, Bluelock's Executive Vice President of Product and Service Development

For more trend forecasting, check out the complete presentation from Bluelock: go.bluelock.com/2018-legal-tech-predictions.html.





Empowering Women in the Workplace

A woman's guide to making sure her voice is heard in the office — and tips for how men can help.



VALERIE A. DANNER
Managing Editor, Legal Management

For better or for worse, 2017 was quite a year for women, notably women in the workplace. And while many of the stories in the headlines are a discussion for another article, they do highlight one important change: Women are making sure they are heard.

And navigating the legal workplace has its own added challenges — challenges that can be magnified for women. A competitive environment that is dominated by masculine styles of leadership and communication can often leave women struggling to find their ground.

“In the past, I always operated with the philosophy that I needed permission to state my opinion, suggest an idea, start a project or come up with a strategy. It took me a while to realize that many of the men I worked with never waited for permission and never even thought about seeking it,” says April L. Campbell, JD, ALA President-Elect and Director of Administration for McCullough Hill Leary, PS, in Seattle. “I am still trying to figure out if the requirement of seeking permission was something I self-implemented, or if it was something taught to me [or] implemented upon me in the workplace.”

Women bring a set of skills to leadership that not only prove effective for rainmaking, but also for handling thornier staff issues. Additionally, clients are demanding more diversity in law firms as a requirement for their business.

Women bring a set of skills to leadership that not only prove effective for rainmaking, but also for handling thornier staff issues. Additionally, clients are demanding more diversity in law firms as a requirement for their business.

Dr. Larry Richard has spent the last 30 years researching lawyer personalities. He says the movement to have women partners in firms has, unfortunately, been monumentally slow. He notes that 20 years ago, about 14 percent of partners were women. Now it stands at just 22 percent. “When 50 percent of lawyers graduating are women, that’s just ridiculous,” says Richard.

While the numbers appear bleak, the legal environment is ripe for a change. He believes we may actually be entering a golden age for women in law firms.

“The way I look at the legal profession, the things that have happened in the last five years represent more change than at any previous time in the history of the profession,” says Richard, who is the Founder and Principal Consultant at LawyerBrain. He notes as recently as 10 years ago, firms were concerned with more left-brain analytical traits: Are the lawyers smart enough? Are they competent? Do they deliver on time? While those things are still vital, research is indicating that success is dependent on other skills like listening and understanding emotions — traits women rank more highly in.

There is much discussion about firms needing to innovate to stay relevant and attract top talent. One area that shouldn’t be overlooked for making this happen is elevating more women into leadership positions. It’s an area where firms can immediately move to make strides.

“The bottom line is that people skills are going to dictate success in the next decade for firms,” says Richard. And that puts women’s leadership strengths at a great advantage.

Here’s advice for how women can make sure their voices are amplified in their firm.

EMBRACE EMPATHY

Richard says that law firm leaders are increasingly looking for colleagues who can be more collaborative and less siloed. Research at Harvard shows that greater collaboration leads to greater profitability and more loyal clients. Among the key

skills that enable collaboration are emotional intelligence competencies such as active listening skills and the ability to accurately understand others’ emotions.

“Women are more attuned to others’ reactions and will talk through rather than ignore the reactions,” says Campbell.

And the science agrees. A study from MIT researchers revealed that there are three factors that make for a smarter team: people taking turns to speak, empathy, and having more women on the team. In fact, they discovered that factors like intelligence *aren’t* what makes a group productive. While diversity is good for any group dynamic, this research went a step further and noted that the more women, the better.

“Women are going to make change and collaboration work better, period, end of message,” says Richard. “In a time when law firms now must pay attention to collaboration, the secret weapon is women.”

ALA Past President (2015–2016) Teresa Walker is Chief Operating Officer at Waller Lansden Dortch & Davis, LLP, a large firm in Nashville. She notes that lawyers tend to be too competitive with one another — even within their own firms, which can quash teamwork and collaboration. She recommends recognizing the traits many attorneys lack that legal management professionals more routinely possess and seizing on the opportunity to bring those unique skills to the forefront.

For example, Richard notes his research consistently reveals that lawyers lack resilience, sociability and an ability to listen. One area they also notable fall short? Empathy. It’s also a skill women score high in.

In fact, Walker says, empathy is one of the most valuable assets of young women entering law firms. “Look at the partnership and leadership of most law firms: it’s a male majority, and as a group, they aren’t naturally good at being empathetic. Skills of relating and showing empathy are game changers when dealing with client and personnel issues. To best serve a client, you have to relate to them and think like them — not become the client by substituting your judgment

But empathy isn't a bad word, and not embracing that trait is also bad for business development. Clients are coming to firms with difficult problems, be it emotionally charged family-law issues or medically induced bankruptcies. These are tough enough conversations for clients to have, let alone feeling comfortable to share necessary details.

for theirs — but understanding what their desired outcomes are and why.”

Caroline Turner, Principal of DifferenceWORKS LLC and author of *Difference Works: Improving Retention, Productivity and Profitability Through Inclusion*, says women are generally much better at reading the emotions of a room.

“The average woman is more likely to have that strength ... but the way leadership has been defined for decades, it can be seen as a weakness. We let our feminine strengths atrophy, and men don't feel safe using their feminine strengths either.”

But empathy isn't a bad word, and not embracing that trait is also bad for business development. Clients are coming to firms with difficult problems, be it emotionally charged family-law issues or medically induced bankruptcies. These are tough enough conversations for clients to have, let alone feeling comfortable to share necessary details.

That's where having legal staff who are tuned into the nuances of these conversations are vital for gaining a client's trust.

It's not just clients who will benefit from staff who have this skill set. “Some of the most difficult problems with which to deal as a legal management professional are personnel problems, especially those of a partner who has a ‘life’ problem,” Walker says. There are many difficult conversations that law firm leaders have to have throughout the course of their careers. She notes the prevalence of substance abuse in the legal industry, particularly in law firms, and the high incidence of suicide within the profession. “Women in law firm leadership positions are especially equipped to have very difficult conversations. It's a huge opportunity for legal management professionals to step up and use their empathetic skills to be sure the person gets the treatment they need. It is in situations such as this that a legal professional can really shine — step up and say ‘I've got this.’”

Richard notes that he'd also like to see empathy stop being classified as a “soft skill.” In fact, he cites a book by Chris

Voss, a former FBI hostage negotiator who says the single most important strategy and skill in rescuing a hostage is empathy. “Think about the source of that statement — it really changes your view that empathy is a soft skill. It's not soft at all.”

AVOID DISCLAIMERS — AND GIVING UP THE FLOOR

Ask any woman: Have you been interrupted and talked over in meetings? Shared an idea in a meeting that went unheard and unheeded — only to have a male colleague bring up the same idea a heartbeat later and get praised for it? They're situations they know all too well.

“There have been many moments when I felt that I did not get the credit/acknowledgement for a project that I deserved because I did not boast of my accomplishments and instead ‘worked quietly,’ rather than ‘worked loudly,’” says Campbell.

Turner notes that it often comes down to differences in styles of the average woman and man. Men are more likely to use a definitive statement: “We're going to file this pleading.” Meanwhile, women are more likely to spin that as “I've been thinking about filing this pleading. What do you think?”

And it's not a bad thing to speak in this manner; in fact, Turner says it's powerful to use questions. “Open-ended statements invite conversations.”

But workplaces often see this as a weakness — people erroneously assume speaking like that means a woman is not very sure of herself or committed to the idea.

“When a man is aggressive, he's often labeled in positive ways — hard-charging, dedicated to his clients. When a woman behaves in the same way, she's uppity. That's a built-in bias women face,” says Richard.

Turner says women often start conversations with disclaimers or hedge statements. “They'll start with statements like ‘I think’ or end a statement with ‘right?’ which can lead to them

Don't tolerate inappropriate interruptions or a male colleague chiming in to take over the conversation. "The average woman is more likely to give up the floor when interrupted. That's what I always did, since I was raised not interrupt and be polite," Turner says. But learn to break that habit and trust in your own expertise.

getting talked over. Too often [women] do not take steps to change the tone or direction of the conversation."

She suggests recognizing when you need to be especially persuasive in a meeting so you can avoid hedging or using disclaimers. "We need to coach ourselves to speak in a way that's associated with certainty, competency and leadership."

And don't tolerate inappropriate interruptions or a male colleague chiming in to take over the conversation. "The average woman is more likely to give up the floor when interrupted. That's what I always did, since I was raised not to interrupt and to be polite," Turner says. But learn to break that habit and trust in your own expertise. She says when she became aware of her habit of ceding the floor, she actively sought ways to change her behavior. It took practice, but she gained confidence and finessed the skill by watching other people do it.

"Now I'll just say, 'I'm sorry, I'm not finished. Please let me finish my thoughts.' I had to learn not to give up the floor and to take it back. I wasn't doing justice to my position by giving up the floor," says Turner.

The more you do it, the easier it will become.

MEN: BE AN ALLY

Sometimes, men aren't even aware of these issues. But calling it to their attention can mean you've got another person in your corner.

When Turner was midcareer, she recalls, she was in a senior leadership position at a beer company, where the balance of men to women in leadership was perhaps even more skewed than the legal world. She was just starting to read research related to gender communications and the importance of gender diversity. She decided it was important enough to share this knowledge with her boss, who was the Chief Executive Officer (CEO). She wanted to bring to his attention that issue of a woman proposing an idea and getting no response, only to



have a male colleague chime in with a similar idea a few minutes later and get lauded for it. "He told me that doesn't happen here," Turner says.

The next Monday at the staff meeting, she was the only woman in the room. She brought up a point she thought was worthy. Nobody responded. A few minutes later, the Senior Vice President of Marketing said almost the exact same words and everyone jumped on board. The CEO looked at Turner with what she describes as an a-ha moment — he saw the behavior that she'd just described to him a few days earlier. And he said, "Bill, it looks like you agree with Caroline."

"Last year, I had lunch with that CEO and he started telling me that story, and how he came to the defense of a colleague who was in danger of having her idea stolen. He will never not see that now. Once it's pointed out to a man, they will see it," says Turner.

The same goes for when you see women colleagues being talked over. Richard says you need an enlightened leader or good Samaritan in a position of power who is willing to speak up and call it out as it happens. "Fixing this problem won't happen on its own," he says.

Sometimes, men aren't even aware of these issues. But calling it to their attention can mean you've got another person in your corner.

WOMEN: ENDORSE ONE ANOTHER

By that token, women can also help other women be heard. They can easily recognize this behavior — and shut it down. Turner says when we see another woman who hasn't been heard, interject with "Catherine, that is a great idea. Can you say more about that? I'm really interested in your thoughts about that strategy." Or if you see a female colleague's idea being hijacked by a male colleague, try: "I think Catherine was just making that very point. Catherine, can you expand on your idea?" By stepping in, you're crediting and sponsoring her, giving her back the floor — and added support.

Mentoring other women is another way for women to encourage one another. Campbell says it's helped her build her confidence over the years. "I have always been more passive about standing up for myself and more active in helping others stand up for themselves. I have found that I am more comfortable with my voice when I am acting in the capacity of a supervisor, manager, coach and mentor because it allows me to encourage those that I am supervising and coaching to find their voice and authority and be taken seriously," says Campbell. "Ironically, the power, confidence and voice this has given them has made me realize that I need to take my own advice. In doing so, I have found myself to be much more action-oriented."

Plus, you never know who is watching you as a role model to learn from your actions. "Looking up to people who behave a certain way — that's more powerful than any words you can say," says Richard.

DRIVING CHANGE IN YOUR OFFICE

When clients speak, law firms listen. Indeed, Richard says that is likely what will get firms to see a greater cultural shift — clients are placing more demands on law firms for attitudes, behaviors and diversity as conditions of doing business with firms. "That will speak louder than just about anything else," says Richard. "Client expectations are going to make a big difference."

In the meantime, practice and persistence go a long way to building your confidence in these situations. Campbell notes putting her ideas out there has worked for her as well. "I

have always had many ideas and suggestions that require the approval of someone else," she says. "Rather than have my suggestions sit in the pile because they are not taken seriously, I have found myself implementing them anyway, sometimes boldly and sometimes quietly.

"When they are finally noticed and/or acknowledged, I take credit for them whether they have been successful or failed. Once I have done this enough times, then it seems that people finally start listening the first time around. Just because someone chooses not to hear me does not mean that I am not speaking. Eventually, they learn to listen," says Campbell.

Richard says it's difficult to overcome the inertia on this matter since it's often invisible to leadership. But firms should commit to leadership modeling these behaviors and implement new policies and hiring standards — and stick to them. "The entire leadership team needs to role model the behaviors and attitudes you want the rest of your firm to adopt."

He says consistent, multiple implicit bias trainings are also helpful, preferably with an outside, neutral facilitator. He notes many low-resilience male lawyers will see such a suggestion as a personal attack, rather than see the positive message of it being a benefit to the whole firm. A neutral outside facilitator is less likely to be seen as partisan."

"Create and foster a set of values among your leaders where women are respected and treated equally, and it helps eradicate the double standard," says Richard. "The more you infuse a culture of a firm with those attitudes and behaviors, the more you can foster a respectful mindset among the rank and file lawyers." ■

ABOUT THE AUTHOR

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Legal Cartography

Client journey mapping, which legal managers can help guide, helps ensure a successful process.



ED FINKEL
Freelance Writer and Editor

Chicago-based Levenfeld Pearlstein LLC has developed a standard series of 15 intake questions about client expectations, hired a firm-wide manager of process improvement who works directly with practice group leaders, and developed a Google Docs-like extranet through which clients and attorneys can communicate and get up to date.

The Boston office of Seyfarth Shaw LLP has streamlined its process for handling real estate finance transactions to cut down on unnecessary steps in the process and duplicate efforts. It also ensures all attorneys and staff are contributing at their highest level of ability — so that paralegals would not do what a secretary could handle just as easily, for example.

In Nashville, Baker, Donelson, Bearman, Caldwell & Berkowitz has developed a tool for a client that frequently needs nondisclosure agreements to standardize and easily generate them, while accounting for the nuances that need to be built in from document to document.

These innovations — which can impact a single client, a practice area or the entire firm — have come about thanks to client journey mapping, a tool borrowed from the corporate world in which attorneys and legal managers work together to track the steps clients take

“The purpose of it is for the firm to understand, from the client’s perspective, what are the things we are doing that add value to our relationship, what things are required for whatever reason, and to reduce and eliminate the things that are not contributing value.”

along their legal pathways to ensure they’re providing the best service. And they can rethink and reinvent the client journey as deemed necessary.

“The purpose of it is for the firm to understand, from the client’s perspective, what are the things we are doing that add value to our relationship, what things are required for whatever reason, and to reduce and eliminate the things that are not contributing value,” says Catherine Alman MacDonagh, JD, Chief Executive Officer and Founder of the Legal Lean Sigma Institute. “We want to focus on those interactions where we could improve, but also on the corollary — where are we good at things? And then say, ‘Let’s do more of that!’”

MacDonagh notes that firms she works with are often surprised by how many people, touch points, rework and waiting are involved in the process. “If we can reduce, if not eliminate, that waste, that’s a pretty substantial payoff. The reason we do a lot of this work is to gain competitive advantage. Ideally, we’re communicating what we’re doing with our clients, asking how we’re doing, and then they can give us feedback on our performance. That then makes its way out into the marketplace as a differentiator,” she says.

Levenfeld Pearlstein defines client journey mapping as knowing the client, identifying touch points and operationalizing a business strategy to meet that client’s needs in terms of delivering value, says Andrea Maciejewski, Director of Client Development. The firm has developed a five-step approach: attract and retain talent, lead by example, cultivate effective practice groups, align systems, and ask for feedback.

“We connect everything we do in our firm to those steps, and how the client engages with us,” Maciejewski says. “We work at the intersection of pricing, process improvement and project management. It’s about shifting the way clients experience a law firm.”

Baker Donelson began its client journey mapping by starting with what happens when a client enters its offices — how

they’re greeted, whether coffee or water is offered to them, whether the Wi-Fi guest password is easily accessible, “things that would make you feel at home,” says Adam Severson, Chief Marketing and Business Development Officer. With 24 offices across the southeastern United States, Severson says the firm aims to put some core bones and amenities in place across all their offices.

“That was helpful from an operational perspective, to make sure we were able to fine-tune that a little bit,” Severson says. “In some instances, the wait time was longer than what I would like it to be: ‘I called him, and he’s not in his office.’ [But] you can still send an email or track down his assistant.” He says there are still a few steps you can take to make sure a client doesn’t have to wait.

Seyfarth Shaw — known as an innovator with regard to client journey mapping and Lean Six Sigma business process improvement more generally — set up a standalone practice called SeyfarthLean Consulting that undertakes such projects. They start with what problem they are trying to solve, whether it’s a client process that could be more efficient, something is taking too long and costing too much, or the right people aren’t doing the right work.

Then, they work with attorneys and staff in various functional areas to dig into what they’re doing and why, sometimes leveraging the questions of people new to the firm who aren’t yet invested in the old ways of doing business, says Kim Craig, Managing Director, Lean Solutions. “We’ve always tried to include not only legal experts, but also the professionals that support them,” she says. “Any process improvement is change management. That’s where so many of the legal managers are left to try to orchestrate: how do we put these changes into place?”

THE LEGAL MANAGER’S ROLE

To do so, Craig’s team interviews secretaries, administrative assistants, office managers, data gurus and other staff to try to paint the full picture of steps involved in a client process. “The process would never get improved without getting into

“We’ve always tried to include not only legal experts, but also the professionals that support them. Any process improvement is change management. That’s where so many of the legal managers are left to try to orchestrate: how do we put these changes into place?”

that layer of detail,” she says. “My assumption the first time I started doing mapping was that the partners were going to run [roughshod] over everybody. And that didn’t happen at all.”

Legal managers at Levenfeld Pearlstein play a huge role in the process, ensuring that systems are aligned to best support lawyers’ work and clients’ needs, Maciejewski says. “A lot of times, lawyers are expected to do everything, which makes no sense from a business perspective — of course, they’re the end deliverers,” she says. “We’re all involved in different steps, down to specific tools and execution. We’ve all been involved in designing the strategy and executing on it.”



MacDonagh says legal managers can be a catalyst in making the firm aware of the concept of client journey mapping and getting lawyers and staff up to speed on how it could work for them. “A lot of administrators work very directly with the management team, and they work with all the practice group leaders,” she says. “The more we can educate legal administrators that this is a really valuable tool available to them and their firms, they can figure out then how best to introduce and position it.”

Legal managers also can use the tool to both help attorneys improve their clients’ journeys as well as to map out attorneys’ own journeys, says Yolanda Cartusciello, Partner at PP&C Consulting. “It would be the job of an administrative group to look at this journey and say, ‘Here are the problem areas. How can we fix it?’” she says. “The reason this technique helps is it becomes granular. Rather than a partner saying, ‘I can never get the documents I need out of the records department,’ client journey mapping would allow you to say, ‘Where does this begin, what are the steps, what is the partner trying to accomplish?’”

Client journey mapping often reveals that the problem begins earlier in the process than at the point of frustration, and often it’s a process that was set up a long time ago and hasn’t been looked at in a long time, Cartusciello says. “It could be that the lawyer can’t get the documents he wants out of records because there was a safeguard set up to not allow lawyers to get the record unless they were approved as part of a team.”

COSTS AND BENEFITS

Client journey mapping costs time and attention on the part of attorneys and administrators, and those costs should become ongoing if the concept is handled properly, Cartusciello says. “They may bring up issues that they didn’t know existed, that once raised, do need to be addressed,” she says. “Once you start down this road, you can’t just say, ‘done, fixed, we never have to look at this again.’”

But the benefits of a client-centric culture that also better understands what lawyers go through on a daily basis are well worth the trouble, Cartusciello says. “If you’re trying to resolve processes between administrative functions, you end up with better functioning administrative systems and, therefore, lawyers are less likely to go around the system.”

MacDonagh also sees internal benefits in terms of C- and D-level business professionals coming together as a team, gaining an enhanced appreciation for what one another brings to the table and accomplishes on behalf of the firm.

"If you're trying to resolve processes between administrative functions, you end up with better functioning administrative systems and, therefore, lawyers are less likely to go around the system."

"Lots of times, it's outside our grasp what somebody else is doing, and the things they have to work around, and the obstacles they face in order to get work done," she says. "It's very eye-opening every time. People will say, 'My gosh, I didn't know you needed this thing I do at the very front of the process.' There are always things that come out of mapping that will give you immediate improvement — and others for the medium and long term."

Levenfeld Pearlstein sees major payoffs in competitive advantage when a firm executes on a client's service plan and builds healthier relationships — and greater value. "The more value you bring, the more loyal they're going to be," Maciejewski says. The top challenge in getting there is resistance to change, which the firm has spent a ton of time managing, she says. "You have to make sure leaders are trained to manage that."

Severson cites an improved and more consistent client experience as the central benefit for Baker Donelson. The challenge, in a firm of 750 attorneys, has been that many have their own communication styles and even were in different firms at one time before Baker Donelson merged with them. "They've come with different experiences and ways they like to handle things," he says.

As in the real estate finance project, the Boston office of Seyfarth has used client journey mapping to talk about different steps in the process and make sure they're capturing the highest and best use of everyone's time, says Joanne McBride, Office Administrator. "We don't need somebody at my level worrying about somebody's access card," she says. "Somebody who is billing their time should not be handling an administrative piece."

"If you don't see the full picture, you're missing things," adds McBride. "If you can capture it all in one spot with the whole team, you're starting in a much better place." ■

ABOUT THE AUTHOR

Ed Finkel is a full-time freelance writer and editor who covers law, technology, medicine, education and youth, and other issues. His legal writing background includes work for the *ABA Journal*, *Student Lawyer* magazine, the *Illinois Bar Journal* and *Chicago Lawyer*.

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MICHAEL MOORE, JD
Founder, Moore's Law, LLC

“

Law firm leaders need to be proactive and plan now for the inevitable effect of demographics and time on themselves, their teams and their law firms.”

Aligning Your Stars: Succession Planning for the Administrative Team

How will your firm replace that senior billing manager who handles conflict checks and invoicing when they retire? How about the collections specialist who knows everything about your client database? Is your firm addressing the evolving role of the legal secretary?

Current demographics in most law firms, regardless of size, have made succession planning a critical issue. How will your firm identify and execute the critical steps for effective succession planning for key administrative positions? Are you developing your next generation of leaders? What methods will help you get the lawyers to buy into the process?

FOR WHOM THE BELL TOLLS

Our law firms are aging rapidly. By 2020 more than 50 percent of the legal workforce will be age 55 and older. This will be accompanied by a sharp reduction in the available workforce between the ages of 35 and 55. These demographics appear to indicate many law firms face a potential 20 percent reduction among their current staff. However, a recent survey found that only 26 percent of law firms have succession plans in place for their key leadership positions and administrative teams. More than 60 percent of the law firms claimed to be relying on an informal or ad hoc process if needed.

Effective succession planning usually begins with analyzing the firm's specific demographic trends. Retirement, disability or, unfortunately, even death might be the cause of future departures. And with many law firms already operating with minimum staff levels and most positions already multifunctional, your existing strategies may transfer critical operational knowledge of day-to-day responsibilities to various staff positions that could have little capacity to absorb it. Therefore, you also need an effective plan to fill key positions quickly when members of your senior administrative team leave the firm.

KNOWLEDGE SUCCESSION

An effective plan should include strategies to transfer knowledge, not simply functions. Law firms create, use, and store large and valuable amounts of information, such as key client details, the firm's core cultural values, its best practices and even important historical details. This information has recognized value because it includes both knowledge and experience, but this value can be lost if knowledge transfer methods are not expanded beyond the occasional one-on-one teaching moment.



Every law firm's unique culture is created by the shared values of the people at the firm. They are demonstrated through behaviors deemed appropriate and acceptable for creating success at the law firm. The values then become internalized, part of daily routines, and help define the expectations of team members who make up the culture. As such, shared values need to be passed on to new leader in a formalized, rather than ad hoc, way.

LEADERSHIP SUCCESSION

Developing future leaders is critical to ensuring a law firm's ongoing success. My experience working with leaders at firms of various sizes has confirmed that they need specific skills to be truly effective in their role, such as:

- A financial understanding of their firm and the strategic thinking skills necessary to address increased competition — in other words, the ability to understand their markets and their firm's place in them.
- Excellent interpersonal and communication skills, including the courage to make tough decisions and the patience to try to reach a consensus.
- A keen sense of humor, since lawyers frequently take themselves too seriously. Creating a welcoming, encouraging culture often requires prioritizing positive things; injecting appropriate humor is often effective.

Depending on the structure of the specific law firm, there are different ways to transition leadership responsibilities. Assigning specific tasks to future leaders will test their ability to organize and handle projects. These next generation leaders should both understand and be involved in as many operational areas and decisions as possible. If the firm has a formal mentoring program, participation by the staff and administrative team may also be helpful.

OBSTACLES TO GETTING STARTED

Effective succession planning often requires some difficult conversations that many people prefer to avoid. Of course, getting started is usually better than agonizing over the inevitable. One place to begin the discussion is to focus on actual activity, not impressions or expectations. What are the practical realities of the succession path? What are realistic timelines and objectives along that path?

If possible, try to identify some specific activities and avoid being generic or vague. If you are the one who must initiate

the discussion, start with the positive. Try to be empathetic and see the situation through the eyes of the other person, who may be confronting their eventual departure. Focus on needs, solutions and the details of execution.

MAKING SUCCESSION PLANNING A REALITY

Among my law firm clients, succession planning is rapidly moving from a strategic objective to a competitive necessity. Commencing succession planning discussions is difficult. It will require changes to common methods and the adoption of new paradigms of success.

An effective succession plan of action will need to include knowledge transfer and leadership development, as well as competitive adjustments for the market impact of diversity and value migration. However, we know that a knowledge advantage means nothing unless you also have an action advantage. Law firm leaders need to be proactive and plan

now for the inevitable effect of demographics and time on themselves, their teams and their law firms. ■

ABOUT THE AUTHOR

Michael Moore, JD, is the Founder of Moore's Law, LLC, and helps both lawyers and law firms create professional success. Moore specializes in individual marketing, client development, and leadership coaching and advises law firms on strategic planning, growth initiatives and resource optimization. A frequent speaker at ALA events across the country, his current topics have included mentoring, leadership, financial management and strategic planning.

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Succession planning is a major, ongoing challenge law firms face. Join Michael Moore as he discusses this topic more in-depth at the ALA Annual Conference & Expo in National Harbor, Maryland. Visit alanet.org/conf18 for more details. Additionally, you can hear more on *Legal Management Talk*, where Moore was recently interviewed. Download the conversation through your podcast app, or listen here: alanet.org/education/online-learning/podcasts.



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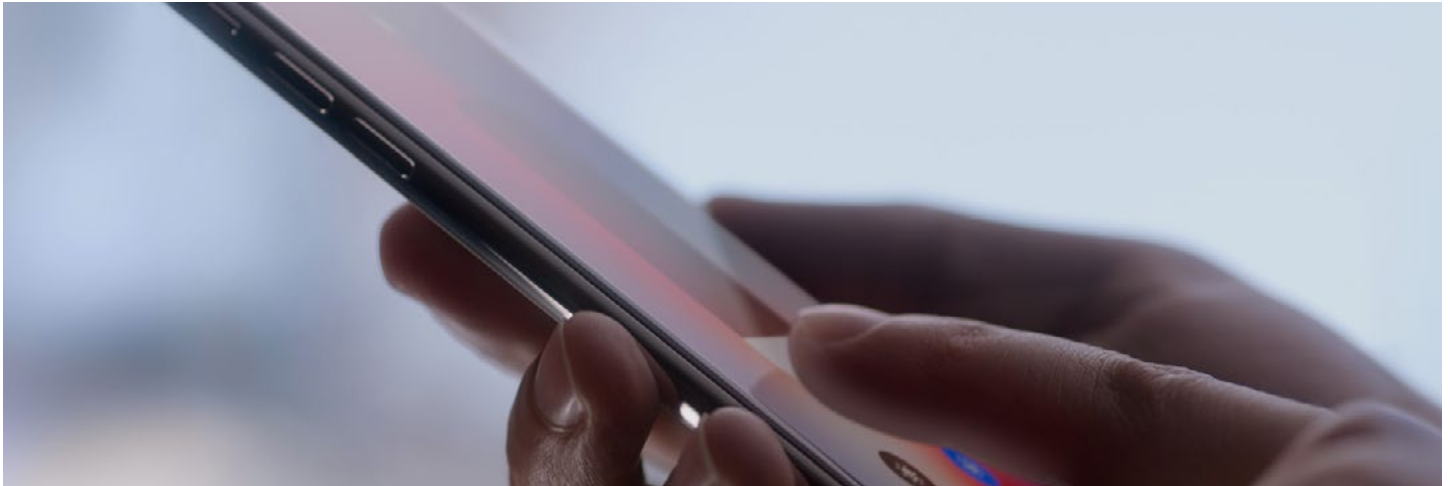
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A \$1,000 iPhone? X (Pronounced “10”) Marks the Spot

A cell phone that costs as much as a computer? Really? We love our gadgets, but even a couple of gadget spendthrifts like us found the price for the new iPhone X shocking. But we bought one anyway. (It actually cost us \$1,149.)

“

We love our gadgets, but even a couple of gadget spendthrifts like us found the price for the new iPhone X shocking.”

We have to say that the iPhone X setup was elegant. iOS 11’s new Automatic Setup feature lets you hold your old device near your new one to transfer essential info. You must first, of course, back up your old machine to the cloud. Then, start up your new iPhone X. It will tell you to “Bring your old iOS device close” to your new one. When you do so, a little panel pops up on the old device, giving you some instructions to follow to “pair” the devices. To complete the pairing, you must aim the camera of your old device at the whirling cloud patterns on the screen of the iPhone X. And that’s it. The Wi-Fi and Apple ID settings are beamed from one device to the other. Your phone number and all your data are automatically transferred.

Many of the features of the X are brand new. First, there are the visuals. There is no “home” button — it has been replaced by the soon-to-be infamous “notch.” There is no bezel — the 5.8-inch display covers the entire front; it just has a very thin frame around the screen. It looks a lot like a Samsung Galaxy 8 (which we bought earlier this year), except its frame is stainless steel rather than aluminum. The X has an OLED screen that has superior contrast and brightness and is easier to view at an angle. The screen is big, but because it has no bezel, the phone itself is not big.

ON TO USE AND PERFORMANCE

You unlock the phone not with your fingerprint but with Face ID. Yes, it is true that Samsung has “been there, done that,” but Apple’s Face ID works better than Samsung’s. Face ID is easy to set up and easy to use. (It makes a 3D scan of your face, so it even works at an angle.) It is not perfect, but it works very, very well. Still, it is a habit you will have to develop



if you are accustomed to the fingerprint scan. The real problem is that Face ID uses a camera placed in the “notch” at the top of the phone. When you view items in full screen, the notch gets in the way.

The X is clearly designed with the new iOS 11 in mind. Instead of pressing the home button, you swipe up from the bottom of the screen. To get the Control Center, you swipe from the upper right of the screen. Swiping left still takes you to the camera. There are several other gesture and control changes that you have to learn, which take some getting used to.

The phone is very, very fast, probably the fastest mobile phone you can buy. It uses a new chipset, the A11 Bionic — phone gamers will be in heaven. However, the speed and the larger display do not sacrifice battery life. In this area, the X

is a vast improvement over the iPhone 7, which pooped out battery-wise too quickly in our experience. Also, like the new Samsung Galaxy phones, the X charges wirelessly; unlike those phones, it does not support fast wireless charging speeds. Apple says it will support that feature very soon.

IS IT WORTH THAT PRICETAG?

So it’s time for the \$1,000 question — is the X worth the price? Let’s put it this way: If you do not like abrupt changes or a somewhat steep learning curve, save your money and get the iPhone 8. In fact, one could argue that the 8 is a better phone for most people’s purposes. The notch is annoying, and the X really can’t do anything that other smartphones can’t do.

As gadget nerds, we spend money to play with new stuff and experiment. Sometimes it seems we enjoy being annoyed with quirky toys. Bill believes the X is the future of the iPhone, and he has enjoyed the expensive taste of his new toy. Phil says he will stick with his dependable and technically advanced Samsung Galaxy S8. ■

ABOUT THE AUTHOR

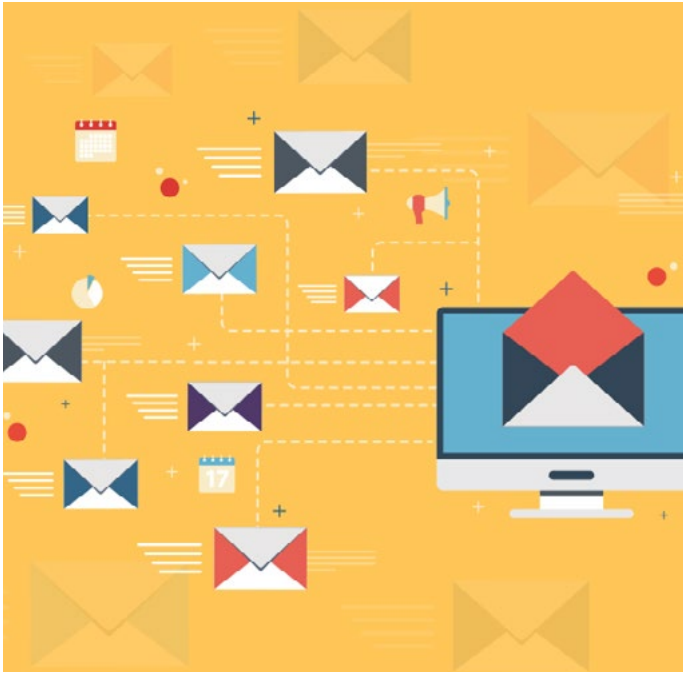
William Ramsey, Partner at Neal & Harwell, and LogicForce Consulting President **Phil Hampton** are best known for *The Bill and Phil Show*.

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Cross-Cultural Communication and International Email Etiquette

By Sharon Schweitzer, JD



By this point in your professional career, you've mastered the art of the business email, comprising a professional greeting, succinct, organized body paragraphs and a brief, cordial closing. The keystrokes become automatic as you type dozens — perhaps hundreds — per day. It's an efficient system when emailing within your own organization, but what about when you need to contact or introduce yourself to a global client or counterpart? What about when you're managing a multicultural team?

The reality is that the American email prototype isn't a model for all global cultures, many of which perceive the direct style of American writing as impolite or even abrupt. With email as one of the primary modes of business communication, with more than 250 billion sent daily, it's easy for lines to become crossed when communicating across cultures. What are the solutions?

CREATING CULTURAL ALLIANCES

New research from Stanford and Cornell academics reveals that certain country cultures tend to correspond via email more

intensively due to economic and cultural similarities. Even geographically distant cultures tend to coalesce based on commonalities that facilitate easier communication. Factors such as language and gross domestic product — as well as cultural dimensional traits like individualism, masculinity and how power is distributed in a society — all influence international communication.

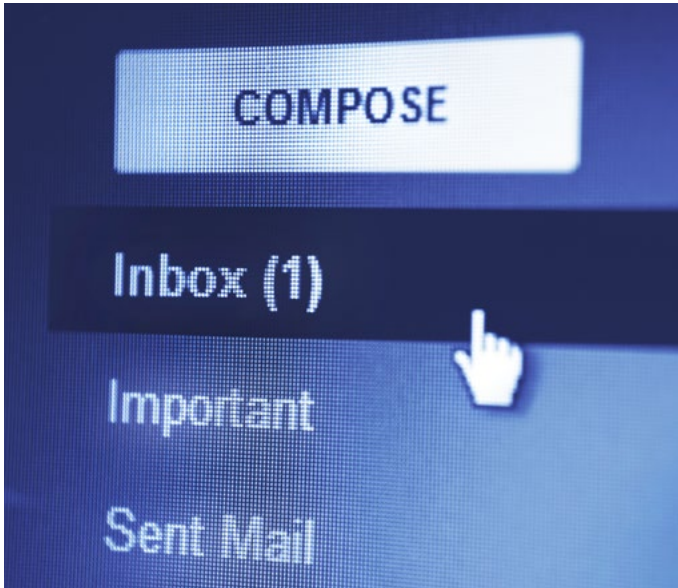
These implicit characteristics will ring a bell to anyone familiar with social psychologist Geert Hofstede's research on cultural dimensions and their impact on global management. It seems they also affect our email habits. So to effectively communicate across cultural, linguistic and geographical lines, it's important to consider how we format our email according to various cultural standards.

CRAFTING THE PERFECT INTERNATIONAL EMAIL

Even the most culturally savvy professionals can be blindsided by a forgotten courtesy or neglected cultural nuance. To make sure that you're corresponding with global clients and colleagues appropriately, follow these guidelines for a polished email that keeps the conversation going:

- Be sure to include a subject line, with at least two to three words summarizing what will be included in the email. Avoid using "Hi" or "Hey," as this vague subject line may cause the recipient to ignore the email altogether as potential spam.
- When working with time-conscious cultures such as Germany, Israel and Switzerland, include the level of urgency in the subject line. Some good examples include adding "Action Needed" for important projects and "Action Required" for timely projects.
- When addressing the email, use proper titles — according to the contemporary customs of the recipient's culture. As with "Miss" and "Ms." in the United States, in France the form of address "Mademoiselle" has almost been phased out in favor of the more respectful "Madame."

Conducting due diligence in email communication will build trust, inspire respect and build long-lasting relationships in a globalized world.



- Avoid beginning your email with “Hi” or “Hey.” This lacks professionalism in nearly every country. Consider beginning your email with “Dear” or “Greetings.” If you’re using time-sensitive greetings, consider the recipient’s time zone so you avoid wishing your Chinese client a good morning when it’s already close to midnight in Beijing.
- In direct cultures like the United States, it’s best to reintroduce yourself before getting to the main part of your email. Restate your name and organization. Conversely, in indirect cultures, do your homework to understand modern practices in the receiving country. For instance, it’s popular in Japan to ask about the weather in your email introduction. Directly introducing yourself without pleasantries is perceived as rude and abrupt to the Japanese.
- Don’t be a jerk. Humor is culture-specific, so do your due diligence based on location and customs. Most jokes will only be funny and inoffensive to those with similar cultural views. If the punchline is rooted in Western culture, your joke will likely fall flat. Also note that sarcasm rarely comes through in email — instead, attempts at sarcasm or irony may translate as flippancy or a jab.


- When scheduling a meeting or setting dates with a global counterpart, research their country’s date format. For example, in China the date is written as “Year/Month/Day”; in some European and Latin countries it is written as “Day/Month/Year.” In the United States, it is written as “Month/Day/Year.”
- Consider time notation. Many countries keep time on the 24-hour clock rather than the 12-hour clock used in the United States.
- Close the email professionally. If you’ve prepared the email correctly up to this point, wrap things up like a pro. In international emails, use closing phrases or words such as “Kind regards,” “Kindest regards,” “Best regards” or “Sincerely.”

Although there’s no perfect universal formula, conducting due diligence and mastering cultural excellence in email communication will build trust, inspire respect and build long-lasting relationships in a globalized world. ■

ABOUT THE AUTHOR



Sharon Schweitzer, JD, is the Founder of Access to Culture, an award-winning entrepreneur and a cross-cultural trainer accredited in intercultural management. She provides practical techniques to improve communication and increase revenue and has traveled to 75 countries and all 7 continents. Her *Access to Asia* is an Amazon bestseller and was named one of *Kirkus Reviews’* Best Books of 2015. She won the British Airways International Trade Award at the 2016 Austin Business Awards.

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Doris Alexander, CLM, member of the Golden Gate Chapter, is now Firm Administrator at Hirschfeld Kraemer LLP in San Francisco, California.

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April L. Campbell, JD, member of the Puget Sound Chapter, is now Director of Administration at McCullough Hill Leary, PS, in Seattle, Washington.

Barbara Chilton, member of the Greater Los Angeles Chapter, is now Human Resources Manager at Dentons US LLP in Los Angeles, California.

Dina Dalecki (not pictured), member of the Capital Chapter, is now Director of Human Resources at Sughrue Mion, PLLC, in Washington, D.C.

Ronnie DeCesare, member of the Greater Los Angeles Chapter, is now Executive Director at Ervin Cohen & Jessup LLP in Beverly Hills, California.

Tamara Heiden, member of the Greater Los Angeles Chapter, is now Executive Director at Pasich LLP in Los Angeles, California.

Maryanne Interbartolo, member of the Boston Chapter, is now Director of Administration at Womble Bond Dickinson in Boston, Massachusetts.

Bree Johnson, member of the Minnesota Chapter, is now Director of Pricing and LPM at Robins Kaplan LLP in Minneapolis, Minnesota.

Karen A. Kubani, member of Orange County Chapter, is now Director of Administration – Orange County at Gibson Dunn & Crutcher, LLP, in Irvine, California.

Julie Pritchard-Hedtke, member of the Minnesota Chapter, is now Chief Operating Officer at Felhaber Larson Fenlon & Vogt, PA, in Minneapolis, Minnesota.

Leeanne Smollen, SHRM-SCP, member of the Raleigh/Durham Chapter, is now Director of Human Resources at Hutchens Law Firm in Fayetteville, North Carolina.

Christie Sullivan, PHR, member of the Orange County Chapter, is now Director of Human Resources at Stradling Yocca Carlson & Rauth, PC, in Newport Beach, California.

Holly Turnock, member of the Houston Chapter, is now Office Administrator at Kilpatrick Townsend & Stockton LLP in Houston, Texas.



MEMBERS MAKING NEWS

- *The Houston Chronicle's* business section recently published an article, "Non-Lawyers Grow More Powerful in Texas Law Firms," that discussed the professionalization of business development, marketing and talent development at law firms. The article features commentary from ALA members **William Cobb** (President of Cobb Consulting) and **Toby Brown** (Chief Practice Management Officer at Perkins Coie LLP), as well as former member **John Strange** (Director of Pricing and Project Management at Baker Botts LLP).
- Philadelphia Chapter board member **Jessica L. Mazzeo**, Chief Operating Officer of Griesing Law, wrote an article for *The Legal Intelligencer*. For "Why Law Firms Should Already Be Embracing the Mobile Workforce," she surveyed ALA members to discover remote-work trends in law firms, and talked to specialists about policymaking, talent recruitment and considerations about space and technology.

For the links to both of these articles, visit the web version of this page.



LAW FIRM RECRUITERS: Post open staff positions to attract qualified candidates with the experience and knowledge you're looking for.

Post Your Résumé to ALA's Job Bank



With more than 600 open positions in legal management posted each year, ALA's Job Bank can help you find that "next step" in your career.

- Post your résumé for free
- Search for open positions in legal management
- Share open positions with your network
- Subscribe to our weekly Career Connection Newsletter

Learn more at alanet.org/careers.

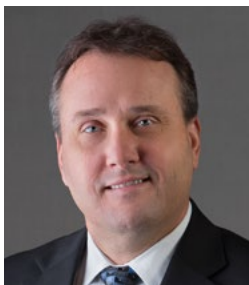
ALA Congratulates Its 2018–2019 Board of Directors and Regional Representatives

The ALA Board of Directors is responsible for establishing the vision, mission and goals of the Association as well as setting its strategic direction.

ALA Regional Leadership Teams, comprised of a Regional Director, At-Large Director and two to four Regional Representatives, are responsible for mentoring the chapters and members within their respective regions.

The members that make up these groups are held in the highest regard and have been entrusted to guide ALA and the legal management profession into the future.

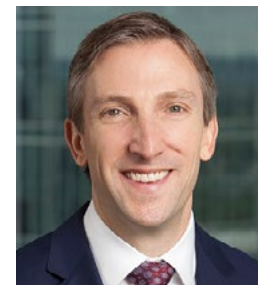
ALA is pleased to announce the 2018–19 Board of Directors and Regional Representatives. These individuals will officially take office in May at the close of the Annual Conference & Expo in National Harbor, Maryland. Please join us in congratulating this extraordinary group of legal management professionals!



IMMEDIATE PAST PRESIDENT
Gary T. Swisher II, CLM
Clark Partington
Pensacola, Florida



PRESIDENT
April L. Campbell, JD
McCullough Hill Leary, PS
Seattle, Washington



PRESIDENT-ELECT
James L. Cornell III
Graves Dougherty Hearon
& Moody, PC
Austin, Texas

at-large directors



Michael T. Bumgarner,
CLM, CPA, CGMA
Flaherty Sensabaugh
Bonasso PLLC
Charleston, West Virginia
Term: 2017–2020



Debra L. Elsbury, CLM
Threlkeld Stevenson
Indianapolis, Indiana
Term: 2016–2019



Brian P. Gilman,
CLM, CPA
Smith Debnam
Raleigh, North Carolina
Term: 2018–2021

regional directors



REGION 1 DIRECTOR
Joseph A. Samarco, MBA
Drinker Biddle & Reath, LLP
Philadelphia, Pennsylvania
Term: 2017–2020



REGION 2 DIRECTOR
Geoffrey M. Williams,
CLM, M.Div.
Cunningham Bounds, LLC
Mobile, Alabama
Term: Immediate–2019*



REGION 3 DIRECTOR
Kimberly A. Ess
Nilan Johnson Lewis PA
Minneapolis, Minnesota
Term: 2018–2021



REGION 4 DIRECTOR
Candace K. Childress, SHRM-CP
Blank Rome LLP
Houston, Texas
Term: 2018–2021



REGION 5 DIRECTOR
Lori A. Hughes
Miller Nash Graham & Dunn LLP
Portland, Oregon
Term: 2017–2020



REGION 6 DIRECTOR
Shaun M. Morrison
Allen Matkins Leck Gamble
Mallory & Natsis LLP
Los Angeles, California
Term: 2016–2019

*Geoffrey M. Williams's term is effective immediately to fill the vacancy in the Region 2 Director position.

2018–2019 Regional Representatives

region 1



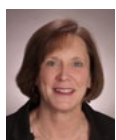
Susan Hunter, CLM
Petruccelli, Martin & Haddow, LLP
Portland, Maine
Term: 2018–2020



Stasia (Stacy) Joyce, CLM
Locke Lord LLP
New York, New York
Term: 2017–2019



Diane J. Vlahos
Rath Young & Pignatelli, PC
Concord, New Hampshire
Term: 2018–2020



Virginia (Gigi) R. Wentzel
Latsha Davis & McKenna, PC
Mechanicsburg, Pennsylvania
Term: 2016–2019

region 2



Karen Michelle Beasley
Goodis Thompson & Miller, PA
St. Petersburg, Florida
Term: 2018–2020



Sandra A. Corcoran
Hedrick Gardner Kincheloe & Garofalo, LLP
Raleigh, North Carolina
Term: 2018–2020



Elena Lopez-Lee
McGuireWoods LLP
Atlanta, Georgia
Term: 2017–2019



Valerie A. Williams
Pender & Coward, PC
Virginia Beach, Virginia
Term: 2017–2019

region 3



Kara M. Brostron, CLM
Lashly & Baer, PC
St. Louis, Missouri
Term: 2018–2020



Lisa V. Fox
Pines Bach LLP
Madison, Wisconsin
Term: 2017–2019



Patricia A. Winter, CLM, PHR, SHRM-CP
Foran Glennon Palandech Ponzi & Rudloff, PC
Chicago, Illinois
Term: 2018–2020

region 4



DeAnna L. Lopez, CLM, SPHR, SHRM-SCP
DLA Piper LLP (US)
Houston, Texas
Term: 2017–2019



Timothy C. McKay, CPA
Harris Fingley & Bogle, PC
Fort Worth, Texas
Term: 2017–2019



Paul M. Walker
Snow Christensen & Martineau
Salt Lake City, Utah
Term: 2018–2020

region 5



Christopher W. George
Pacifica Law Group
Seattle, Washington
Term: 2018–2020



Lisa A. Sterritt
Lane Powell, PC
Seattle, Washington
Term: 2017–2019



Marcia A. Zigrang, CLM, SPHR, SHRM-SCP
Angstman Johnson
Boise, Idaho
Term: 2018–2020

region 6



Karen L. Godfrey
Brownstein Hyatt Farber Schreck, LLP
Las Vegas, Nevada
Term: 2018–2020



Terri J. Oppelt, CLM, SPHR, SHRM-SCP
Klee Tuchin Bogdanoff & Stern, LLP
Los Angeles, California
Term: 2017–2019










Shelley A. Strong
Littler Mendelson, PC
San Jose, California
Term: 2017–2019



Experience ALA's 2018 Webinar Series

For the best value in online education, look no further than ALA webinars — 42 sessions spanning functional specialties and topics for every legal management professional.

CHECK OUT THESE UPCOMING WEBINARS:

JAN. 17	The Happy Hour Effect: 5 Key Commitments to Elevate Your Personal and Professional Success	
FEB. 1	Social Media, Digital Marketing Mechanics and More	
FEB. 8	How to Move Your Entire Firm to the Cloud	
FEB. 13	ADA and ADAAA Training for Human Resources	
FEB. 14	Has Your Company Bridged the Gap Between Human Values and Ethics? Does It Matter?	
MAR. 1	Trello: Increase Your Productivity Overnight	
MAR. 8	The Financial Reporting Checklists Every Firm Should Be Doing	

Don't miss out! All our 2017 webinars are available on-demand.
Learn More: alanet.org/webinars

What's Happening at Headquarters?



REGISTRATION IS OPEN FOR ANNUAL CONFERENCE

We're calling for all hands to join ALA in National Harbor, Maryland, for the 2018 Annual Conference & Expo. At the Gaylord National Resort & Convention Center, we'll navigate our future together — from advancing the concept of inclusiveness to grappling with new technologies and business trends.

Of course, it'll be a rip-roaring time, too — an opportunity to meet and network with legal management professionals and business partners from all over. The conference takes place May 3–6; save by registering before **the early bird deadline on February 5: alanet.org/conf18**.

TUNE IN TO THE LATEST EPISODES OF LEGAL MANAGEMENT TALK

The latest episodes of ALA's podcast feature conversations with writers who appear in this very issue of *Legal Management*. In one, Michael Moore, JD, discusses law firm succession planning. In the other, Christina Floyd and Karen Leastman expand on financing office renovations. Like all our podcast episodes, they are available at alanet.org/education/online-learning/podcasts or through various podcast apps, including iTunes. Both episodes are previews of live education sessions at the 2018 Annual Conference & Expo.



2018 WEBINARS OPEN FOR REGISTRATION

Next year's schedule features 42 webinars designed to assist in professional development and help legal management professionals learn more about industry trends and best practices. Although you can pick and choose based on your specialization or interest, there are a few packages you may take advantage of:

- 2018 Unlimited Pass: Delivers access to all 42 webinars
- 2018 Five or Ten Coupon Bundle for Any ALA Webinar, Live or On-Demand: Ideal for a chapter in search of education or for someone seeking information about a certain competency area
- CLM Bundle 2018: Satisfies the education requirements of the Certified Legal Manager (CLM)[®] exam application

ALA's educational offerings serve multiple purposes: paving a pathway toward Certified Legal Manager (CLM)[®] credentials, fulfilling continuing education credits, and providing the latest information about best practices in many areas of the legal industry. Most of next year's dates are locked in, so you can browse the course catalog and mark up your calendars — the email, phone and desktop versions — with which interactive digital classes you'd like to participate in.



WANT TO EARN A LEGAL MANAGEMENT SPECIALIST CERTIFICATE?

In 2018, take one of our six-week, in-depth e-learning courses to prove you have specialized HR or FM knowledge. Registration has already begun for 2018's first course, HR1: Employee Selection & Promotion; the course itself kicks off January 15. Registration starts March 12 for HR2: Performance Management & Compensation; the course begins May 14. Learn more at alanet.org/elearning.



Get Your 60 Seconds of Fame!

At least for ALA members, Warhol was wrong — 60 seconds of fame will do just fine. Our annual video contest is seeking imaginative testimonials about the value of ALA membership.

Voting opens immediately before the 2018 Annual Conference & Expo in May. The winning video will be announced at the Association Awards Gala.



Enter by April 16!
alanet.org/60-seconds



CALENDAR

JANUARY 12

ALA BOARD OF DIRECTORS MEETING

Chicago, Illinois

JANUARY 15

MARTIN LUTHER KING JR. DAY

ALA Headquarters Closed



JANUARY 17 | 2 P.M. CENTRAL

THE HAPPY HOUR EFFECT: 5 KEY COMMITMENTS TO ELEVATE YOUR PERSONAL AND PROFESSIONAL SUCCESS

Stress negatively affects our lives professionally and personally, and the legal profession is no exception. It's estimated that 80 percent of people say their job is the most stressful aspect of their lives. Furthermore, 1 million people are calling in sick to work every day due to stress — not to mention those who show up but are unproductive, unfocused or even actively sabotaging their teams. By understanding the dynamics of stress and how it impacts you and your team, you can better manage it so it doesn't stop you from being successful in your career and personal goals. This session will discuss the Happy Hour Effect framework and how it can help reprioritize the dynamics of your life with clarity, and offer fresh action for work/life happiness, health, career success and stronger relationships.

Questions about this event? Contact psiems@alanet.org.



FEBRUARY 1 | 2 P.M. CENTRAL

SOCIAL MEDIA, DIGITAL MARKETING MECHANICS AND MORE

You have social media. You have a website. You support both with content such as blogs. But what is all of it really doing for you? In this session, we are going to take a look behind the curtain of your law practice's strategic marketing plan to discuss your website foundation, together with the seven digital marketing strategies you need to get your law firm ranked on Google's first page. From SEO (search engine optimization) and the Google suite (including Google analytics/webmaster tools, Maps and AdWords) to publishing platforms, small search engine maximization, and reporting and conversion, we will dive deep into what your strategy should look like, along with best practices for getting where you want to go with your integrated digital marketing.

Questions about this event? Contact psiems@alanet.org.



FEBRUARY 8 | 2 P.M. CENTRAL

HOW TO MOVE YOUR ENTIRE FIRM TO THE CLOUD

The cloud is here, and it's rapidly evolving with more and better services available to law firms every year. Getting to the cloud or changing from one cloud system to another can be a delicate and time-consuming process. Here, we cover best practices in selecting a cloud provider, preparing for a successful migration, and dealing with the inevitable surprises that will occur.

Questions about this event? Contact psiems@alanet.org.

Congratulations to Our New Certified Legal Managers

Certified Legal Managers (CLM)[®] can take great pride in their achievement. Their journey to attaining the CLM designation includes completing a very rigorous certification process that demonstrates they have a mastery of the essential knowledge, skills and abilities of a highly proficient legal management professional.

Kara M. Brostron, CLM

Denise M. Clark, CLM

Lisa M. De Zordo, CLM

Elyssa A. Goldstein, CLM

Mimi Grossman, CLM

Kasia G. Johnson, CLM

Karen J. Laughman, CLM

Karen A. Lemmon, CLM, JD

Dennis Alan Mann, CLM

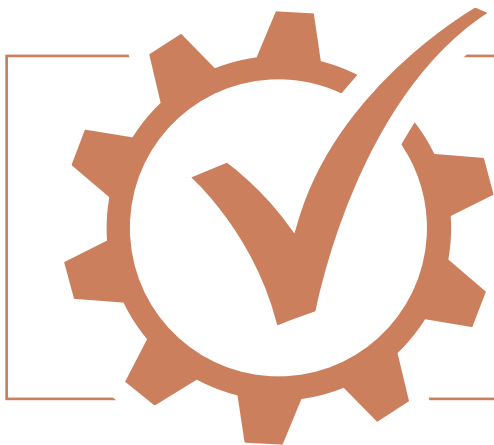
Benita Maupin-Koch, CLM

William D. Mech, CLM

Karie D. Rivkin, CLM

Laura T. Sears, CLM

Patricia A. Winter, CLM, PHR, SHRM-CP



EARN THE CLM MARK OF DISTINCTION

No matter your career stage, CLM certification can help get you to the next level — and show employers you've mastered the knowledge and skills to operate at a high level of expertise in legal management. Learn more about the benefits of certification: alanet.org/education/certification/benefits-of-certification. Visit alanet.org/education/certification/applying-for-the-exam if you're ready to apply for the exam.