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CONSTRUCTING THE IDEAL HEALTH AND WELLNESS INITIATIVE

Find out what amenities firms are offering — and how to provide your employees with the best possible experience.





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LEGAL MANAGEMENT STAFF

PUBLISHER

Oliver Yandle, JD, CAE
oyandle@alanet.org

EDITOR-IN-CHIEF

Theresa Wojtalewicz
twojtalewicz@alanet.org

SENIOR MANAGING EDITOR

Valerie A. Danner
vdanner@alanet.org

ASSOCIATE EDITOR

Kate Raftery
kraftery@alanet.org

ADVERTISING OPPORTUNITIES

Robert Leighton
advertising@alanet.org

ART DIRECTOR

Jeff Wojciechowski
Straight North, LLC

GRAPHIC DESIGNERS

Abby Burkle
Straight North, LLC

Agnieszka Williams
Straight North, LLC

WEB TEAM

Eric Michalsen
Straight North, LLC

Greg Wixted
Straight North, LLC





APRIL CAMPBELL, JD
2018–2019 ALA President
Director of Administration
McCullough Hill Leary, PS

For What You're Worth

As we wind down 2018 and careen into 2019, I would like to pause and reflect on the state of our oftentimes invisible profession. I am not going to delve into how the public does not know that we exist as a profession, nor am I going to try to convince you that our relevance is changing as firms transition into a stronger business/corporate model (because many firms are not getting on board with that necessity).

“

For 2019, for the benefit of my health and well-being, I plan on being LOUD. Not just for myself, but for all of us, and I hope that you will join me.”

I am thinking about how we are often the invisibles — the people working in the background who no one pays much attention to until you are not there any longer and everything falls apart. Over these past eight months as ALA President, I have heard disheartening anecdotes: firm administrators having to justify the value of their positions to their firms; chief operating officers being let go without explanation or ever receiving a review after many years of service; low salaries and zero raises; and many, many job consolidations because partners do not want to pay the overhead of professional staff — no matter your relevance or position, but simply because you are not generating revenue as a timekeeper. It makes my heart hurt and my head spin. And it irks the heck out of me.

This month's issue includes two feature articles, one on health and wellness and the other on making employee reviews relevant, that got me thinking. How much of our health and wellness as legal management professionals is based on feeling appreciated and valued in our places of employment? And how many of us receive feedback and consistent employee reviews?

The demographics of our Association show that many of us — more than 50 percent — are employed by law firms with 29 attorneys or fewer. Having worked at several firms within that size range, I am going to make an educated guess that many of us have never received a formal performance review, and if we have, it is not on a consistent basis. Smaller firms often lack the structure and procedures that require such formality. Now, think about how many monthly, quarterly or annual performance reviews you give to those you supervise, or how

many times you have served as a coach or mentor to those same individuals. How many times has that been done for you inside your workplace?

We know that consistent and plentiful feedback and reviews improve performance and morale, which is why we do it for others and for the benefit of the firm. I know many of us are pulled and stretched in many directions. We are the plate spinners — but do we know if we are spinning the right plates at the correct height and the proper speed? Without feedback, it is difficult to know if our priorities align with those of our partners or if a project's outcome is viewed as successful.

Many of us are doing more with less and most of us are more stressed than ever. Wouldn't it be nice if you knew how you were doing? I encourage you to use the power of this Association and your peer connections to leverage the most out of the knowledge you gain from others. Share it with your partners, tell them why it is important to the business and make sure that you all agree on what your priorities are as a legal management professional. Ask for that review and feedback. You deserve the same consideration of your well-being and morale as everyone else in your office.

For 2019, for the benefit of my health and well-being, I plan on being LOUD. Not just for myself, but for all of us, and I hope that you will join me. I am going to ask a lot of questions to get that feedback.

On a final note, I was recently reminded of who does appreciate what we do — our business partners. They see behind the curtain and they understand what we do. Not only am I going to be loud, but I also will focus more on collaborating with them.

As members of this great Association, let's continue to share our successes and remind one another why our roles are relevant. In doing so, we will gain more forward momentum and reiterate why ALA is so important to all of us. Here's to 2019! I look forward to tearing it up with you! ■



acampbell@mhseattle.com



www.linkedin.com/in/april-campbell-ba0954a

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DUSTIN JOHNSON
Vice President, GLJ Benefit Consultants

“

Check out this testimonial for a firsthand account of how a telehealth program helped one firm: <http://bit.ly/2EfdqEP>.”

Telehealth: Elevating Your Firm's Health and Wellness Initiatives

Over the years, I have sat in many annual benefit review meetings. As programs and numbers are discussed, typically two questions inevitably arise: What can we do to better control costs? What are we missing? In today's day and age, these two questions complement each other and can usually be answered in one word: telehealth.

Also known as telemedicine, digital health, and virtual health care, telehealth is a medical benefit that uses technology and convenience to empower individuals to seek medical care. At its best, telehealth provides individuals and their families with 24/7/365 access to nationally board-certified physicians by telephone or video chat.

THE BENEFITS

In short, telehealth is the next step in removing barriers (e.g., cost, geography and time) and providing your attorneys, employees and their families with access to quality, convenient medical care. Let's look at how.

- 1. Control costs:** Telehealth can affect the bottom line for both the firm and the employee. For the employee, a visit to a primary care physician for a checkup — depending on copays — can cost, on average, anywhere from \$15 to \$25 per visit plus the cost of any lab work done. The average cost of an urgent care visit runs about \$150 per visit while the average cost of an emergency room visit is \$1,233. That can amount to a lot of out-of-pocket costs for an employee in any given year. But if your firm is investing in a telehealth no copay program, the out-of-pocket cost to the employee is \$0.

How does that translate into savings for the firm? Traditional doctor visits and unnecessary urgent care visits can increase the firm's health care plan utilization by thousands of dollars. By including a stand-alone telehealth program and encouraging employees to

take advantage of the cost savings offered there, the firm can help curb utilization and ultimately increase the overall health of the firm's medical plan. This translates into better utilization numbers at renewal, and usually a lower increase in medical rates.

- 2. Curb presenteeism and absenteeism:** \$150 billion — that's the annual estimated cost of presenteeism according to the American Productivity Audit, a yearlong telephone survey of 29,000 working adults. Add absenteeism to the mix, and every firm knows that these two metrics add up to huge annual costs.

The availability of telehealth meets these two issues head on. Perhaps you have an employee feeling under the weather who doesn't want to take the time off to go the doctor's office. Maybe one of your attorneys is traveling on business and can't see her primary care physician. Or perhaps you've run out of a prescription and don't want to expose yourself to other sick people in a waiting room. Telehealth allows you and your employees to connect with a doctor via telephone or video chat for a consultation — whether at home, at work or on the road — and to obtain the necessary prescriptions to help get you back on your feet.

- 3. Offer value:** Today's consumers expect instant access to what they need, when they need it. Add in the fact that they are also becoming increasingly comfortable with the integration of technology into their daily lives (from fitness trackers to smart toothbrushes), and it's no wonder that telehealth dovetails nicely with the current culture. Indeed,

with 90 percent of adults under the age of 65 owning a smartphone, the availability of telehealth apps not only helps meet the current consumers' health care needs (both the what and the when), but also provides a more efficient, cost-effective way for them to access care.

HOW CAN YOUR FIRM MAKE TELEHEALTH A PART OF YOUR HEALTH AND WELLNESS INITIATIVES?

The desire for immediate health care is not a fad; it is becoming a consumer expectation, and the workforce is looking to employers to lead the way. Offering telehealth in a benefits package is becoming as common as offering the traditional medical plan (which telehealth complements and does not replace), dental or a 401(k) plan.

As your firm reviews your current benefits program this year, it will ask those two inevitable questions: What can we do to better control costs? What are we missing? Be sure to add telehealth to the discussion. Whether you are new to telehealth or currently offer a telehealth benefit at your firm, as you evaluate the growing number of options, look for a program that provides ease of access, network reliability and no copay for services.

At the end of the day, providing a quality benefits program is an investment in your firm and one of your most valuable assets — your employees. As your firm continues to face the pressure of providing attractive, cost-effective, employee-retention benefits, adding telehealth to your program is one more way you can help elevate your health and wellness initiatives. ■

ABOUT THE AUTHOR

Dustin Johnson, Vice President at GLJ Benefit Consultants, has worked in the employee benefits industry for 20 years. He specializes in designing and implementing group benefits programs (from medical and telehealth to supplemental and voluntary benefits) as well as in lawyers' professional liability insurance. Johnson has worked closely for the past 13 years in the creation of valuable program offerings for ALA membership, and you can often see him assisting with member education on these essential resources at ALA conferences.

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MICHELLE SILVERTHORN
Founder and CEO, Inclusion Nation

“

Bias often means that instead of being seen through rose-colored glasses, women and minorities are seen through dark-tinted ones instead. This is where you intervene.”

5 Ways to Successfully Sponsor Women and Minority Employees

When I started in BigLaw, I didn't know how to succeed. I didn't even know what success looked like. Partner? There weren't a whole lot of black women partners around. Something else that wasn't partner? It wasn't clear what those other options were.

But I was lucky. I found myself working with senior leaders who liked my work and consistently promoted me, advocated for me, and provided me with challenging assignments aimed at helping me grow. Traditionally, they would have been called mentors. But recently, we have realized that those leaders who play the role of advocate, coach, guide and enforcer are far more than mentors — they're sponsors.

Sponsors get their protégés high-profile work, promotions and a seat at the decision table. They provide their protégés with access to exclusive networks, broadcast their achievements to senior executives, and ensure that they have the stretch assignments they need to succeed.

Sponsorship — not mentorship — is the true route to success in the workplace. And that's precisely where issues of race and gender arise. See, throughout corporate America, white men run the show. They are in every position of leadership at every level throughout every industry in this nation. With few exceptions, sponsors — the ones who have the power in an organization and the ability to effectively utilize it — will be white men. And when they choose their protégés, they frequently choose people who look a lot like them.

Even more problematic are the assumptions made about the people who don't look like them, implicit biases that are not explicitly recognized or said out loud. When an assumption is made about who is more competent, who is more dedicated, or who has better leadership skills, that assumption is not often made in favor of the woman or minority professional.

That's why it's critical to understand how to sponsor women and minority employees with particular focus on overcoming the biases that these employees face. Here are five actions that sponsors should take to ensure their sponsoring relationships are successful.

1. SPONSORS CHOOSE HIGH-POTENTIAL PERFORMERS

Not every employee gets a sponsor. As a sponsor, you will need to identify your high potentials. Identify the protégé who is committed to succeeding, not the one who may have attended the same college as you. It may start organically. You see that someone on your team did exceptional work on a recent project. But don't stop there. That's usually how you end up sponsoring protégés who look like you. Continue to do your research. Dive deep into evaluations. Talk to your senior colleagues. Take your potential protégé out for coffee, a long one. Give them a different challenge and see how they handle it. This may sound like a lot of work, but remember, you're not just identifying a protégé. You're interrupting bias as well.

2. SPONSORS CENTER THEIR RELATIONSHIPS ON TRANSPARENCY

Once you've found your protégé, you need to ensure that you both have clear expectations of your working relationship. If your goal is to get your protégé to Level X, then define what Level X is, explain what kind of work is needed to get there, then discuss what the success factors are. If she gets promoted, what happens after that? If he doesn't get promoted, what happens after that? Similarly, you need to be clear on what your protégé needs to do to make this relationship a success. What should their work product look like? What kind of hours should they be putting in? What contacts do they need to follow up with? Sponsorship isn't low-level support. Sponsorship is high-level strategy.

3. SPONSORS UNDERSTAND CAREER COMPETENCIES

I get that career competencies aren't exciting to discuss. But they're necessary. Do you, as the sponsor, understand what your protégé needs to do to move up in your department or organization? What knowledge and skills they need to get that promotion? Many organizations have their levels clearly laid out. Many do not. If your organization is in the former, find out what those competencies are. Some majority white male employees may be able to advance without meeting all those competencies. Minorities and women do not get that



similar benefit of doubt. And what if your company doesn't have clear competencies? Well, this is as good a time as any to get started on that. Having spoken rather than unspoken rules is better for everyone in an organization, including minorities and women.

4. SPONSORS PROVIDE HIGH-RISK/HIGH-REWARD OPPORTUNITIES

Minorities and women are often underestimated as to what they're able to achieve. They may not receive those stretch assignments that majority men frequently get. That's when you step in as a sponsor. When high-profile projects come in the door, ensure your protégé is considered for them. Make sure your protégé is using those stretch assignments to grow their knowledge, skills and abilities. Make yourself available for any questions or concerns they may have; remember, this is a stretch assignment — they're going to feel uncomfortable doing it. Then continue to expand their knowledge. Take them with you to meet high-profile clients and customers.

Train them on how to effectively receive and respond to negative feedback. Explain what the visible committee roles at the firm are and encourage them to take those roles on. Success in the workplace is far more than keeping your head down and working hard. You know that. It's essential that your protégé knows that, too.

5. SPONSORS ADVOCATE, ADVOCATE AND ADVOCATE AGAIN

Call it power. Call it clout. Call it social capital. You have it. You need to use it. I'm always surprised when leaders — men and women — discount how much power they have in an organization. Whatever leadership level you

are, you have developed high levels of trust with those around you. Deploy it in favor of your protégés. For women and minority protégés, here's what might happen. They might get that stretch assignment. They might do very well with it. But maybe something about it wasn't perfect, or was just a bit different, and a nagging doubt stays in the head of their project manager. Or maybe they stumbled, and the manager doesn't think they have the capability to handle something else. Bias often means that instead of being seen through rose-colored glasses, women and minorities are seen through dark-tinted ones instead. This is where you intervene. Speak up on their behalf in meetings. Ensure they get credit for their work. Provide that rose-colored perspective. Advocate, advocate, advocate. You manage to do that and you will become known as the executive who can identify high-potential achievers and ensure they soar. That's the legacy of a successful sponsor. ■

ABOUT THE AUTHOR

Michelle Silverthorn is the Founder and Chief Executive Officer of Inclusion Nation, a diversity consulting firm that partners with forward-thinking organizations to design authentic, inclusive workplaces built for success. A graduate of Princeton University and the University of Michigan Law School, she lives in Chicago with her husband and two daughters.

 michelle@inclusionnation.org

 www.linkedin.com/in/michellesilverthorn

 twitter.com/2CivilityMS

 www.2civility.org/author/michelle-silverthorn



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Constructing the Ideal Health and Wellness Initiative

Find out what amenities firms are offering — and how to provide your employees with the best possible experience.



ERIN BRERETON
Owner, Chicago Journalist Media

By the time the American Bar Association officially announced its campaign to target lawyer substance abuse and mental health issues to the public in September, a number of law firms had already signed the associated pledge to institute specific treatment and prevention efforts — including Schiff Hardin.

Spurred by recent reports about stress being inherent in the legal industry, the 500-employee firm had established its own health and wellness initiative a few months prior — which made signing the document an easy decision, according to Managing Partner Marci Eisenstein.

“For us, it was a no-brainer,” Eisenstein says. “Long before then, we had made it clear it was a high priority; we were already well on our way to doing it.”

Schiff Hardin isn’t alone. In the past few decades, alarming findings about the legal industry have been cause for concern — such as the Johns Hopkins University research that indicated lawyers are 3.6 times as likely to be depressed as individuals in other occupations. Another

Research indicates health and wellness programs can provide numerous positive results — including improvements in stress, overall health, depression and physical activity.

study found attorneys exhibit harmful and potentially alcohol-dependent drinking habits at a significantly higher rate than other professionals.

In response, a number of firms have implemented initiatives to meter some of the stress associated with legal work and the potentially negative outcomes that can occur as a result.

Today, employee health benefits often include much more than just medical coverage — potentially encompassing elements to help resolve work-life balance challenges, such as unexpected child-care needs, according to Bruce Sammis, Chief Executive Officer (CEO) of insurance brokerage firm Lockton, which has helped structure health and well-being plans for legal and other organizations.

“Some law firms are now looking at mental health and stress and factors beyond fitness — realizing associates at a firm or young partners putting in a ton of hours places stress on family and their health,” Sammis says. “They’re starting to broaden their definition of wellness to well-being.”

HEALTH AWARENESS ADVANTAGES

Research indicates health and wellness programs can provide numerous positive results — including improvements in stress, overall health, depression and physical activity, according to results from the three-year study published in 2018.

They may also be able to help employers cut costs: An analysis of previous wellness program studies found medical expenses fall by more than \$3 for every dollar spent on wellness programs, and absenteeism-related costs decline by nearly \$2.75.

In 2017, two-thirds of law firms offered some type of wellness program, according to a survey conducted by Alliant Employee Benefits — 2 percent more than the year before, and a 9 percent increase from 2014.

While the majority (24 percent) focus on physical health, a sizeable portion of the programs also address other concerns — including employees’ emotional (22 percent), financial and occupational (20 percent), and social (13 percent) health.

Some focus on disseminating general information about healthy living to employees. Others involve on-site health screenings, flu shots and other services; some present an array of mind-body activities, ranging from yoga classes to health coaching and personal training.

To gauge which amenities would work best in its wellness program, Schiff Hardin distributed a survey in May 2018 that asked firm members to comment on proposed benefits and their work environment, work-life balance-related stress and overall engagement.

A few months later, the firm shared its findings with employees.

“We wanted to take a holistic, sustainable approach to wellness, driven by the needs and desire of our people; we weren’t just trying to check the box,” Eisenstein says. “[And] the survey didn’t evaporate into the ether. We said, ‘Here’s what we found, here’s what we plan to do’ so people knew it was a priority and we generated some excitement about it.”

The approach helped encourage employees to participate in the massages and meditation sessions the company began offering a few months later.

“People have really taken advantage of it,” Eisenstein says. “The feedback we’re getting is that they’re thrilled.”

BUILDING THE PERFECT PROGRAM

Law firms hoping to establish a health and wellness program will likely find there’s no one-size-fits-all solution.

Assessing employee needs is often the first phase in instituting an employer-sponsored initiative. Once your firm has a sense of what benefits would best resonate with employees, the following steps can help ensure the program you create provides the best participation and health improvement results.

Find a qualified partner to work with. Some firms decide to outsource program development or oversight. JoAnn Eickhoff-Shemek, PhD, FACSM, FAWHP, co-author of *Rule the Rules of Workplace Wellness Programs* and a

professor in the University of South Florida's Exercise Science program, recommends hiring a professional with a degree in health education — or from an exercise science program that includes health education courses — who'll be able to develop, implement and evaluate the program.

"Worksite wellness professionals can come from such diverse backgrounds; it's not a government-regulated profession," Eickhoff-Shemek says. "Almost everybody and anybody can call themselves a wellness professional. When employers say, 'Why am I not getting a return on my investment?' it's likely because of improper design and delivery of the program from the get-go."

Ensure your program is compliant with applicable laws. Some companies entice employees to participate in nonmandatory health and wellness initiatives through financial incentives, such as an \$800 health insurance premium reduction if employees agree to a health risk assessment.

Employees may be fine with taking the test; their firm, though, needs to ensure information that's being collected through any program or screening platforms isn't being sold or given to another party without employees' consent, according to attorney Barbara Zabawa, the other co-author of *Rule the Rules of Workplace Wellness Programs*, who owns the Center for Health and Wellness Law, LLC, a boutique law firm that provides services to the health and wellness industry.

"Some law firms are now looking at mental health and stress and factors beyond fitness — realizing associates at a firm or young partners putting in a ton of hours places stress on family and their health. They're starting to broaden their definition of wellness to well-being."

"I'd want to see the privacy and security policies and consent form; if [a third-party wellness vendor] tends to only protect identifiable information, I'd want to know why. Are they selling the de-identified information that can be re-identified later?" Zabawa says. "Firms have to be cognizant of what the vendor might be doing with the information."

Include easily accessible activities. The 20-minute duration Schiff Hardin chose for its monthly chair massages and 13-week meditation course seemed to be an amount of time

that would allow the firm to accommodate all interested employees — without stressing them out about being away from their desk for too long, according to Eisenstein.

"We made the massages short because we wanted everybody who asked to be able to get them; we didn't want it to [involve] the strain of, 'I've got to get to the front of the line,'" she says. "We also try to change the days of the week they're offered, so if you're a person who has a flex arrangement or a particular commitment [one day a week], you can reserve a slot."

Consider altering your office environment to enhance health. Since New York law firm Olshan Frome Wolosky instituted its wellness program several years ago, the midsize firm has overhauled numerous aspects of office life to support having a healthier lifestyle, according to Co-Administer/Partner Steven Gursky.

In addition to meditation sessions, an exercise challenge and in-office blood pressure screening, when the firm moved to a new office two and a half years ago, it decided to provide standing desks for employees where such desks could be accommodated.

"The studies were very clear that it increases productivity and is better for your back, kidneys, blood pressure; you can feel tension in the back of your neck when you're hunched over, leaning into a computer screen," Gursky says. "There's something about having a meeting standing around as you would at a bar table in a restaurant that's more energetic than someone slumped in a chair. People have really taken to it."

Offer more favorable food options. In addition to presentations on healthy eating, Olshan Frome Wolosky swapped some of its vending machine cookies and other sweets out for granola bars and raisins, added flavored water to its soft drink selection, and receives a fresh fruit delivery every couple of days to provide employees with nutritious snack options.

Food that the firm orders in also echoes its commitment to wholesome eating.

"A lot of our meetings, instead of a platter of sandwiches, are make-your-own-salad meetings," Gursky says. "It's just healthier. It has become popular and is always an alternative when you say you're having a meeting and need it catered."

"I understand asking people to add something else to their already busy lives is not necessarily an easy sell, but the benefits would be felt throughout the community — because when people are taking better care of themselves, everything runs more smoothly."

Stress that even small lifestyle changes can make a difference. Promoting wellness has been a focus for Maria Vathis, an attorney based in 1,400-attorney firm Bryan Cave Leighton Paisner LLP's Chicago office, since she began her term as President of the Federal Bar Association in October. A special committee within the organization is currently in the process of putting together a national fitness challenge Vathis hopes to roll out to bar association chapters in May.

In addition to the steps-based challenge, Vathis says she'd like to bring more awareness to the importance of legal industry members carving out time during the workday for self-care.

"Take a few minutes to yourself, get up, have some water, go for walk outside — just break up the day a bit," she says. "I'm not suggesting attorneys stop focusing on their job; sometimes you've just got to work on whatever you have that is due. But hopefully, not every day is like that and you have the flexibility to do something positive for your well-being."

Tap into additional industry group resources. The ABA's wellness pledge commitment form outlines seven steps firms can take to address and prevent substance-use disorders and mental health issues, ranging from de-emphasizing alcohol use at company events to providing self-assessment tools and establishing leave policies so employees are able

to seek treatment for mental health and substance abuse-related concerns.

Over time, Vathis expects more firms and bar associations will begin to promote health-bettering habits — allowing legal industry members to make decisions that will reduce their risk of illness, substance abuse and other negative health outcomes, and potentially also helping to improve the industry as a whole.

"Whatever your role may be, if you don't take care of yourself, you can't continue to take care of clients, cases and other responsibilities," Vathis says. "I understand asking people to add something else to their already busy lives is not necessarily an easy sell, but the benefits would be felt throughout the community — because when people are taking better care of themselves, everything runs more smoothly." ■

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

 twitter.com/erbrer09

 www.chicagojournalist.com

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5 Keys to Crafting Relevant Performance Reviews

Proper reviews are more than just a once-a-year check-in. Use these tips to make them more meaningful for your employees.



DREW AMOROSO
Founder, DueCourse

Well-crafted performance reviews can be one of the most valuable tools to help drive progress and development within a law firm. Reviews are more than an opportunity to document performance and provide relevant feedback — they're also a key vehicle to help confirm expectations, engage and motivate your team members in the development process, and to work together to outline their path forward at the firm.

Valuable reviews are informed by a number of key factors and are the result of a fluid yet intentional process that involves much more than a mechanical, once-a-year check-in. Here are a few things to consider as you prepare for and train your team on the review process.

1. START WITH THE END IN MIND

The contents of a performance review should align with the direction you want the reviewee to be headed and should outline a path for them to get there. "Aim to craft performance reviews with the end goal in mind," says Jessica Sisco, Senior Manager of

We can't expect team members to perform at a high level if what's expected of them is not clear and communicated consistently — so reviews should match the expectations that have already been set out in advance.

Legal Recruiting at Reed Smith LLP. "In addition to serving as documentation of your team member's professional standing and growth over time, reviews are meant to provide enough specific information to inform their roadmap for progress within your organization and enough encouragement and motivation via deserved accolades to follow that map."

Reviews that are crafted with the end goal in mind will tighten the feedback and keep it closely related to the growth pattern you've outlined for your team member.

2. TIE THE REVIEW TO WELL-DEFINED EXPECTATIONS

We can't expect team members to perform at a high level if what's expected of them is not clear and communicated consistently — so reviews should match the expectations that have already been set out in advance. The content of a relevant review will contain expectations from key documents like the employee's job description, internal development outlines and prior reviews.

"It's always helpful to review a team member's job description or firm competency expectations while drafting a review and to focus on providing concrete examples," says Sisco. "Crafting a review in response to outlined responsibilities and competencies can keep feedback consistent, relevant and assist with limiting subjectivity."

Importantly, these expectations are not something that should be discussed just once a year. Reviews are much more effective and relevant to employees when the expectations are reiterated and reinforced throughout the review period.

3. FRAME THE REVIEW WITH REALISTIC EXPECTATIONS IN MIND

Ensure that your expectations of a reviewee's performance are in line with their outlined job description and realistic capabilities.

"We encourage our feedback providers to frame their reviews realistically — which often means making an intentional effort to think about performance metrics at

the associate or staff member's seniority and experience level," says Sisco.

While it's easy to hold our teammates to high standards — which can certainly serve as motivation for them to stretch their skills — the review process is the time to spotlight above-and-beyond strengths and not penalize for consistently at-level performance.

4. PREPARE FOR YOUR TEAM MEMBER'S REVIEW ALL YEAR LONG

Relevant performance reviews must reflect the employee performance during the entire review period — not just the recent past. One way to capture a true picture of your team's performance is to create a central location where you can save praise, feedback and specific examples that will help inform the review process.

Reviews are much more effective and relevant to employees when the expectations are reiterated and reinforced throughout the review period.

Sisco suggests that reviewers set up a yearlong process in which you're saving emails — or crafting notes to yourself — that reference both opportunities for improvement and jobs done well for each of your reviewees. "This helps inform a true yearlong snapshot of performance — not just the past few weeks that are fresh in your memory," she says.

In addition to doing this yourself, also encourage your reviewees to establish their own folder where they can capture successes, areas for improvement or examples of where they instituted prior feedback that led to progress. This exercise offers value on many levels. Along with capturing specific examples that can be discussed in the performance review, your reviewee's ability to see the progress they have made can be a powerful confidence builder. It is easy to spend most of our time thinking about areas for improvement — but a key aspect of development is the ability to draw

It is easy to spend most of our time thinking about areas for improvement — but a key aspect of development is the ability to draw motivation from recounting and discussing small wins and progress that has been made since the last review.

motivation from recounting and discussing small wins and progress that has been made since the last review.

5. REVIEWS ARE A SUMMARY OF PAST DISCUSSIONS — NOT A TIME FOR SURPRISES

Effective reviews should be the formal version of the series of informal opportunities for feedback and praise that have taken place since the last time you reviewed the team member's performance. In other words, "the review should never include any constructive critiques that you haven't already spoken with your team member about," says Sisco.

Waiting until the review to discuss critical feedback can be a pitfall for a number of reasons. First, it may lead to the reviewee feeling confused, caught off guard or feeling ambushed by the feedback — particularly if there have been opportunities to bring it up and discuss it openly prior to the review.

Second, giving the team member time to reflect on the feedback and consider it prior to the review will allow them to come to the table ready to have a much clearer and valuable discussion. Third, the closer in time that feedback is given to the behavior or issue in question, the more effective it will be — so saving a list of issues

to discuss for a review that may take place weeks or even months later is an ineffective way to promote progress.

Instead, take advantage of small opportunities to share feedback on the spot and to address issues as close in time to when they take place. This allows team members to make the kind of incremental, well-informed progress that should be taking place in between review periods. If your organization gives formal reviews on a yearly basis, consider instituting quarterly or more frequent informal discussions to facilitate these important conversations. ■

ABOUT THE AUTHOR

Drew Amoroso is the Founder of the legal tech start-up DueCourse, a professional development platform that helps lawyers achieve their performance and productivity goals and develop practical skills through customized video courses and other technology-based learning methods. Prior to founding DueCourse, Amoroso was a Senior Associate at Reed Smith and was the owner of his own law firm where he practiced fitness law — representing innovators in the fitness and health and wellness industries.



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Revamping Your Firm's Performance Appraisal Process

Organizations are dramatically revamping the appraisal processes to better adhere to the workforce in 2019. Whether the employee is doing a great job or needs significant improvement, it is critical that law firm managers know how to document appropriately the employee's performance and realize the importance of carefully drafting the appraisal. If you're in charge of your firm's review process, you can't miss this session! Join one of ALA's most popular sessions speakers, Michael S. Cohen, JD, in Grapevine, Texas, at ALA's 2019 Annual Conference & Expo. He'll detail the ins and outs of modernizing your employee review process. Register today at alanet.org/conf19.

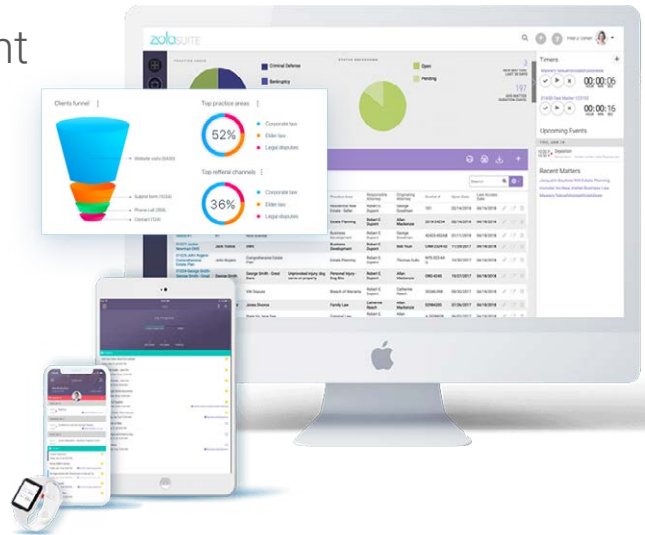


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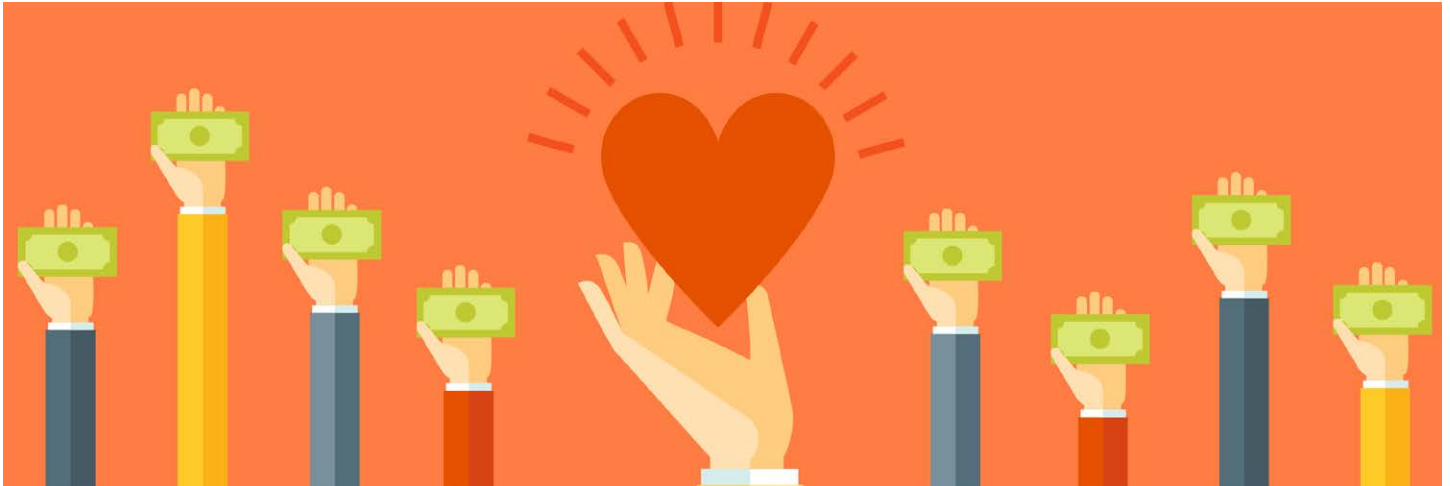
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ROSS FISHMAN, JD
CEO, Fishman Marketing

“

Drastically reduce the number of charities and select a small handful where they can really make a difference.”

The Top 5 Tips for Sponsorships and Charitable Contributions

Spending *other people's money* can make people quite generous. Frivolous, even. And unless a firm has a detailed policy for how its donations are to be evaluated and approved, oversight is exceedingly difficult.

This means that the partners can easily say “yes” to almost anyone or anything. Every favored client or hot prospect’s random pet project. Print ads in their kids’ school and religious-institution programs. It’s reactive, not strategic or calculated to accomplish any particular goal. All that hard-earned money just gradually dissipates.

I get this “charitable contributions” question a lot from law firm clients. What I suggest is that they start winnowing the legitimate commitments from requests from those where people simply want to donate to their favorite causes using someone else’s (i.e. the firm’s) money.

Yes, I know that sometimes big clients squeeze you to support their favorite causes. Some of that is inevitable but, candidly, that’s client-relationship management, not charity. And don’t buy into a warm prospect’s hint that they just might consider hiring you very soon if you donate to their cause — you don’t need to buy your friends.

LAW FIRMS SHOULD DECIDE HOW TO INVEST CHARITABLE DONATIONS

Rule 1: The lawyers should have skin in the game.

That is, the firm will only commit to spend 50 percent of the requested payment, i.e., we’ll match a lawyer’s personal out-of-pocket contribution. If a lawyer is not committed enough to spend their money, then don’t spend firm resources. I’ve seen where this immediately cut the number of causes supported by 50 percent, and the wasted dollars by 75 percent.

Rule 2: They must hold a leadership position.

Giving away money is just too easy, we want to get more people actively volunteering.

Rule 3: Support fewer causes, bigger.

I have worked with firms that donate more than \$100,000 per year but do so on literally hundreds of charities. Drastically reduce the number of charities and select a small handful where they can really make a difference. That is, rather than giving \$500 each to 200 different charities, I'd rather they donate \$100,000 to one truly worthy group, or \$50,000 each to two. Create some actual impact.

Rule 4: Support smaller organizations. Get the banner on the building.

This way, you can do some real good while also supporting your marketing. Get your name prominently displayed in association with the charity. It's not unethical to seek a return on these dollars. The biggest companies unabashedly measure the ROI on their donations.

Reconsider your contributions to large, well-funded organizations like the Red Cross or the United Way where your donation will be a small drop in a massive bucket. Less well-known organizations tend to need the money more, and you can see directly where your money is going and the tangible results they achieve.

For example, Boston litigation firm DeMoura Smith helps fight childhood poverty locally by supporting Cradles to Crayons' "Gear Up for Winter" initiative, buying 102 winter coats for these children. DeMoura Smith's Managing Partner Ken DeMoura said he "prefer[s] supporting groups like Cradles to Crayons where a small firm like ours can make a bigger mark than we can with the larger nonprofits. With local charities we are more engaged, we can volunteer our time as well as our money, we can be creative in stretching the giving, and generally help in both direct and indirect ways."

Rule 5: Choose organizations that support your brand.

Some years ago, we rebranded Goldberg Simpson, one of Louisville's most dynamic full-service law firms. The tagline we'd designed for these aggressive, entrepreneurial lawyers was "A Law Firm That Really Moves." The firm had to find local organizations or events whose missions supported this brand message and enlist the participation of its personnel to help identify relevant causes. They had to find some worthy charities that also in some way really moved.

Instead of sprinkling their charitable dollars across a vast array of charities, they eventually settled on two where they could make an impact: 1) the local triathlon and 2) the Moscow Ballet, which was bringing the *Great Russian Nutcracker* to town. They could be a principal sponsor of both, generating valuable free advertising and city-wide visibility and goodwill. Thousands of Louisville triathletes ran through the streets wearing Goldberg Simpson T-shirts. And the firm got sizable free publicity alongside the *Nutcracker*, including print ads, radio spots and hundreds of free tickets to the ballet.

The firm donated most of the *Nutcracker* tickets to the local children's hospital, enabling sick kids and their grateful families to see the show. It garnered free publicity for that too, and still had enough tickets left over to send the firm and its clients to the ballet, hosting a pre-show party.

Without spending a single dollar more than a ballet-themed print ad and a logo, the firm saw a dramatic public relations boost. Plus, firm morale soared, because their people could see that the firm had been integral to the success of real events that meaningfully helped their community.

An additional benefit of this strategy is that it helps your lawyers graciously decline future requests. No one likes to look cheap or uncharitable, but visibly supporting something enables them to say, "Well, I'd truly like to help but, as you know, our firm spends our charitable dollars supporting X Charity." It sounds entirely reasonable and gets the lawyers gently off the hook. ■

ABOUT THE AUTHORS

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



ross@fishmanmarketing.com



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JOBST ELSTER
Head of Content & Legal Market
Strategy, InsideLegal

Resources to Make You Cloud-Battle Ready

We have devoted many columns over the past two years of this column analyzing law firms' buying behaviors and overall attitude related to cloud computing. Why are firms moving to the cloud? Why now? How fast? And how deep?

“

Many of the supporting technologies that firms are looking for are implemented, or better implemented, on a cloud platform — and thus, the other significant trend here is increased adoption of cloud technologies.”

With each article, we have taken a deeper dive into the legal cloud. So we thought this 2019 kick-off issue would be ideal for sharing a variety of cloud resources law firms can rely on as they navigate the winding cloud technology road. We have asked some legal cloud experts to chime in on their favorite cloud resource.

The International Legal Technology Association provides useful cloud-related survey results. For example, the ILTA 2018 survey includes insights from over 481 firms representing more than 92,000 attorneys and 188,000 total users.

According to Dan Anderson, Chief Executive Officer and Co-Founder of SeeUnity, a provider of content integration, migration and synchronization products for law firms, the ILTA surveys — along with Forrester Research, the Association of Intelligent Information Management (AIIM) and Gartner, a research and advisory company — provide useful statistics and cloud benchmarks. While ILTA is by far the most specialized resource for law firms, the others provide broader technology and business data.

Nicole Black, a well-known legal technology author (including of the ABA's *Cloud Computing for Lawyers*), journalist and speaker, also shared her favorites. “My top resource when it comes to the latest statistics on lawyers using cloud computing is the ABA's Annual Legal Technology Survey Report. It provides lots of great insight and data regarding the number of lawyers and law firms using cloud computing and how they use it.”

Simon Elven, Commercial and Marketing Director for London-based Tikit, favors Briefing's Legal IT Landscapes 2018 research, an annual poll from a cross-section of predominantly large law firms assessing their appetite and interest in cloud technologies and other platforms.

"Many of the supporting technologies that firms are looking for are implemented, or better implemented, on a cloud platform — and thus, the other significant trend here is increased adoption of cloud technologies. In general, cloud services will have overall benefits for the firm in terms of agility for end users and a reduction in the effort required by IT to support such systems," says Elven.



Some other excellent resources:*

ABA: The ABA's Legal Technology Resource Center, which aggregates the most relevant surveys, blogs, articles and commentary about legal technology and the cloud, is definitely worth perusing and bookmarking. While you're at it, check out the Cloud Computing for Lawyers resource page for more useful cloud information.

ALA Resources: The cloud content provided by your very own ALA in the form of webinars, conference educational sessions and articles in *Legal Management* are right at your fingertips and not to be ignored.

Attorney at Work: This invaluable resource provides a new idea, tip and trick each day designed to help improve its readers' lawyering. This, of course, includes navigating the cloud. The recent "Tech Systems: Making Your Move to the Cloud" is a must-read.

CSA: The Cloud Security Alliance exists to promote the use of best practices for providing security assurance within cloud computing and to provide education on the uses of cloud computing to help secure all other forms of computing.

The site provides numerous resources, guides, reports and statistics to help law firms address the all in important cloud security challenge.

"For coverage of the latest security issues regarding cloud and online computing, Sharon Nelson and John Simek's blog, *Ride the Lightning*, can't be beat," adds Black. "Similarly, their book, *The 2018 Solo and Small Firm Legal Technology Guide*, provides solo and small-firm lawyers with an incredible amount of useful advice on choosing the right legal technologies, including cloud-based software, with an entire chapter devoted to law practice management software."

Speaking of blogs, no cloud resource list would be complete without mentioning *DennisKennedy.Blog*, a comprehensive resource for anything legal technology-related, including cloud computing, technology innovation and futures. Site Founder Dennis Kennedy is a well-known lawyer, author, blogger, speaker and podcaster, considered among the most influential authorities on the application of technology in the practice of law. In addition to the blog, he and fellow legal influencer Tom Mighell record the *Kennedy-Mighell Report*, a Legal Talk Network podcast that regularly covers cloud technology topics and the latest cloud surveys.

Lastly, when in doubt, check out popular cloud technology providers like Clio, iManage, HighQ, MyCase, NetDocuments and Smokeball for practical articles, guides, e-books and other resources related to "going cloud." These companies and others are the pioneers in the legal cloud space and have long realized that proper education and useful information are the starting point of any law firm cloud dialogue. ■

**For the direct links to these resources, please visit the online version of this article.*

ABOUT THE AUTHOR

Jobst Elster is InsideLegal's Head of Content and Legal Market Strategy. He has served as a legal market strategist for the last 17 years, advising companies entering the legal market, involved in mergers and acquisitions, and expanding strategic operations overseas. Elster regularly writes and speaks on legal technology, market research and leveraging market data, technology innovations and futures, legal marketing and big data.



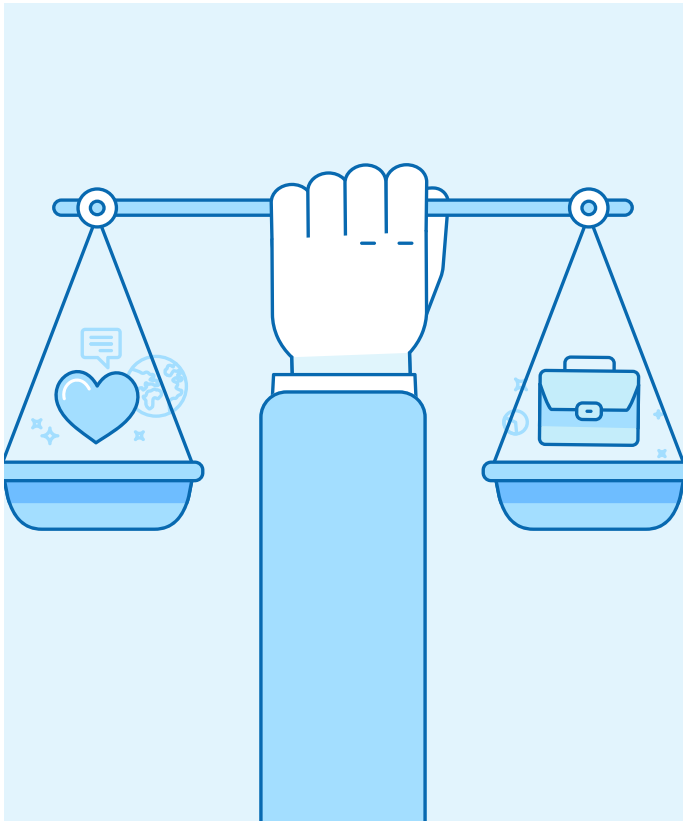
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Time Out! Revolutionizing the Way We Think About Work-Life Balance

By Natalie Loeb, David Robert & David B. Sarnoff, Esq.



Can you relate to this?

"Another call?" Kevin grumbled as he glanced down at his cellphone. "I can't even take a day off anymore." He placed his hand on the phone, which had been lying quietly next to a now half-empty cup of coffee and silenced it. "Sorry about that," he said before returning to our conversation.

"Things must be busy at your office," I said, trying to make Kevin feel less guilty about the interruption. I considered Kevin a close friend, but we hadn't seen each other in weeks. I was excited when he called earlier in the week to invite me to lunch. We had a lot to catch up on, but I was most interested in hearing about Kevin's new role at the firm.

"Director of Operations!" I said. "That's a big responsibility."

"Yeah, tell me about it," he chuckled. "I love what I do. I just wish I wasn't under so much stress."

"So what are you doing to take care of yourself?" I asked. I was curious to understand what Kevin was prioritizing during his workday.

"Well, I'm using some of my vacation days. Although as you can see by the calls from work, there's really no such thing as a day off." He leaned over and took a sip of his coffee before tapping his cellphone to check whether someone had called. "Oh, and I joined a gym," he added. "The firm is paying for it. Although, I've only been twice because I work so late now but at least it's something."

I took a deep breath and sighed loudly. "What?" he asked.

"That's not really what I meant by the question. Lots of firms offer vacation time, and gym memberships, and a slew of other perks," I added. "But obviously they're not working." I was surprised Kevin raised his eyebrows. "The last few times I've spoken with you, you've shared how many hours you're working and how much stress that's causing you. So what are you doing to take care of yourself *while* you're at work?"

Kevin glanced down at his coffee for a few seconds and then scanned the room as if he was confused by the question. "No one can operate at full throttle all of the time," I said pointedly.

Kevin wrinkled his nose. "David, it's not that simple." He sat up and moved his coffee cup to the side. "I oversee a function that supports hundreds of attorneys who are under at least as much stress as I am. Maybe more." I remained silent to encourage him to continue. "Those attorneys are working 60 or 70 hours a week to meet client demands or court deadlines. I have to make sure they're successful."

I felt bad laughing but I had to remind Kevin that as a coach who has worked with dozens of law firms across the globe, I understood the demands of life at a firm. "There are things

When we prioritize our personal well-being, we are more likely to set aside even a small amount of time for things like meditation, exercise, a separation from email, eating healthy, and sharing a laugh or two with a colleague.



you can do immediately to reduce your stress,” I offered. “Think about the impact your stress is having on the people who look to you for guidance and support. This can’t be setting a great example.”

“What advice do you have, then?”

I took full advantage of the opening. “For starters, you can stop calling it work-life balance. As soon as we default to the mindset that work is first, we begin to prioritize work over the quality of our life.” That didn’t seem to convince Kevin.

“Consider this,” I said. “When we prioritize our personal well-being, we are more likely to set aside even a small amount of time for things like meditation, exercise, a separation from email, eating healthy, and sharing a laugh or two with a colleague.”

I reached my hand out and placed it on top of Kevin’s cellphone. “And when we get into the habit of prioritizing our well-being, we are more likely to leave work at work. That’s true life-work balance.”

“And I’m in full control of that,” Kevin confirmed.

“Yes! I set aside two 10-minute slots every workday. I call it ‘time out.’ Sometimes I listen to music. Sometimes I call a friend who can make me laugh. And sometimes I do absolutely nothing. But I always do it.”

“That’s a great idea,” Kevin replied. “I think I’ll start doing that tomorrow.”

“I’m glad to hear that,” I said. “So let’s keep the momentum going by putting our next lunch date on the calendar right now!” ■

ABOUT THE AUTHOR



Natalie Loeb is the Founder of Loeb Leadership Development Group. With more than 25 years of experience in executive coaching and known as an innovative business leader and strategic partner to her clients, she is a thought leader on leadership within the legal world and is regularly approached for her developed expertise by a variety of organizations.



David Robert is Chief Strategy Officer with Loeb Leadership Development Group. Robert brings nearly 20 years of experience to Loeb Leadership as a thought leader in the areas of learning and development, talent management, and change management. Robert has held both internal and external consulting positions at companies across several industries and is the former Chief Executive Officer of Great Place to Work (Middle East).



David B. Sarnoff, Esq., is an Executive Coach and Leadership Trainer with Loeb Leadership Development Group. As a former attorney and experienced executive search consultant, Sarnoff is uniquely qualified and experienced to understand the mindset, demands and challenges of attorneys and legal professionals. He has worked with attorneys at all levels in a variety of practice areas, in law firms and in-house.



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Severance: Practical Guidance for the Departing Executive

By Brian J. MacDonough & Nancy S. Shilepsky



With rare exceptions, employment relationships are not permanent. Indeed, in many cases, executives and professionals should not expect guaranteed employment for a specific period of time, and should anticipate that their employment may end sooner than expected. Therefore, severance has become an increasingly important component of an executive or professional's overall compensation.

Severance may include base salary, earned but unpaid bonuses, pro rata bonuses for a partial year of service, acceleration of deferred compensation and equity vesting, extended option exercise, health and executive benefits, and executive-level transition services.

The terms of severance are negotiable. However, in exchange, the executive or professional is often asked to affirm or agree to post-employment work restrictions, confidentiality, nondisclosure and nondisparagement covenants, and — almost always — a release of legal claims is required.

If severance was not negotiated prior to or during the employment, it will have to be negotiated by the departing executive or professional. While every departure is unique, the concerns of the parties are relatively consistent. When preparing for such negotiations, consideration should be given to 1) the precedent and practice, 2) post-employment obligations and restrictions, 3) public perception and 4) possible legal claims. We'll examine each of these.

PRECEDENT AND PRACTICE

When negotiating executive and professional severance, precedent and practice matter. Lawyers talk about three types of law — the law of the land, the law of the industry and the law of the shop.

Although they may be enforceable under various theories of law, the latter two are not laws in the conventional sense. Rather, they tend to be followed simply because they embody the principles by which an organization or industry operates. Such information may be obtained from a number of sources, including from regulatory filings, industry-specific compensation studies or simply by asking others.

POST-EMPLOYMENT OBLIGATIONS AND RESTRICTIONS

If an organization has an ongoing need for an executive or professional's services — or even if the organization simply wants the executive or professional to be available as needed during transition — the executive or professional may be able to negotiate post-employment consulting compensation. Likewise, if the organization wants to restrict the executive or professional's professional activities after the departure, provided such restrictions are legally enforceable, additional compensation may take the form of "garden leave" and/or enhanced severance. Even if such restrictions had been obtained prior to or during the employment, such restrictions may be of questionable legal enforcement and an employer may seek to bolster enforceability through severance terms.

PUBLIC PERCEPTION

An organization's ability to attract new talent is affected by how it treats its departing employees. It also conveys a

An organization's ability to attract new talent is affected by how it treats its departing employees. It also conveys a message to the public about integrity and stability.

message to the public about integrity and stability. Thus, many organizations value the ability to convey a message of a deliberate and thoughtful transition.

In exchange, such organizations may be willing to provide a transition runway (such as more time on payroll in a different position), protection of earned but unpaid compensation (such as forward vesting of equity and deferred compensation), and additional post-employment protections (such as enhanced or accelerated retirement benefits). Transition service providers may be retained to ensure a smooth transition, and communications professionals may be engaged to be sure that the message of that smooth transition is "the story on the street."

POSSIBLE LEGAL CLAIMS

On their own, bad and even unfair employment actions are usually not unlawful. Rather, to be unlawful, the action must be illegal either in motive or in the means by which it is implemented — such as a succession planning decision motivated by unlawful age bias, or a termination implemented in violation of the safeguards provided in an employment agreement. As a general rule, possible legal claims fall into the following four categories:

- Statutory claims include certain whistle-blowing and retaliation claims, discrimination claims, ERISA claims (such as interference with retirement or employee welfare benefits), and claims regarding the nonpayment of wages (as said term is defined under applicable state and federal statutes).
- Contract claims include not just breaches of explicit contract terms, but also breaches of the implied covenant of good faith and fair dealing.
- Claims for equitable include breach of the fiduciary duties that may arise from the nature of certain relationships such as partnerships.
- Tort claims include defamation, tortious interference with advantageous or contractual relations, and intentional infliction of emotional distress.

Needless to say, not all departing executives and professionals have the necessary leverage to obtain or materially improve the terms of severance. However, in almost all circumstances, short of a termination for cause or an organizations' dire financial circumstance, the payment of (or at least the request for) severance is anticipated.

As a practical matter, the departing executive or professional should treat the negotiating of severance as they would the negotiation of any other term of employment — and leverage the circumstances discussed above to obtain the most favorable terms possible. ■

ABOUT THE AUTHOR



Nancy S. Shilepsky is Chair of the Employment Law Department at Sherin and Lodgen. Shilepsky has built a nationally recognized practice representing executives and professionals across a wide range of industries with regard to complex employment matters involving executive employment, retention, compensation, whistle-blowing and severance.



nsshilepsky@sherin.com



Brian J. MacDonough is a Partner in the Employment Law Department at Sherin and Lodgen. MacDonough works with executives and professionals on a wide range of sophisticated employment and compensation matters, including contract negotiation and enforcement, discrimination, whistle-blowing, wage and hour issues, and wrongful termination.



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ALA Congratulates Its 2019-2020 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 2019-2020 Board of Directors and Regional Representatives. These individuals will officially take office in April at the close of the Annual Conference & Expo in Grapevine, Texas. Please join us in congratulating this extraordinary group of legal management professionals!



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Blank Rome LLP
Houston, Texas
Term: 2018-2021



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Miller Nash Graham & Dunn LLP
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Term: 2017-2020



REGION 6 DIRECTOR
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King Holmes Paterno &
Soriano, LLP
Los Angeles, California
Term: 2019-2022

2019–2020 Regional Representatives

region 1



Marlys M. Hickman
Fox Rothschild LLP
Philadelphia, Pennsylvania
Term: 2019–2021



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



Sharon L. Stewart
Lowenstein Sandler LLP
New York, New York
Term: 2019–2021



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Rath Young & Pignatelli, PC
Concord, New Hampshire
Term: 2018–2020

region 2



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



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Hedrick Gardner Kincheloe
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Term: 2018–2020



Rita F. Garrett
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Atlanta, Georgia
Term: 2019–2021



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Burlington & Rockenbach, PA
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Term: 2019–2021

region 3



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Lashly & Baer, PC
St. Louis, Missouri
Term: 2018–2020



Melissa M. Clark
Cummings McClorey Davis
& Acho, PLC
Livonia, Michigan
Term: 2019–2021



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

region 4



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Shook Hardy & Bacon, LLP
Houston, Texas
Term: 2019–2021



Stacey J. Ransleben, CLM
Thompson & Horton, LLP
Houston, Texas
Term: 2019–2021



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

region 5



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



**Marcia A. Zigrang, CLM,
SPHR, SHRM-SCP**
Perkins Coie LLP
Boise, Idaho
Term: 2018–2020

region 6



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



**Marsha Kendall, SPHR,
SHRM-SCP**
Steptoe & Johnson LLP
Phoenix, Arizona
Term: 2019–2021

Anniversaries, Awards and Appointments

CONGRATULATIONS TO THE NEWEST CLMS!

The following legal management professionals fulfilled their certification requirements and passed the Certified Legal Manager (CLM)[®] exam in November to earn their credential:

Maria Florio, CLM
 Viktoras Kaufmann, CLM
 Amy Kempster, CLM
 David Martin, CLM
 Stuart Maslanik, CLM
 Brian McTague, CLM
 Andrew Moschella, CLM
 Anne Paisley, CLM, PHR, SHRM-CP
 Elizabeth Pecina, CLM
 Christine Peterson, CLM
 Karen Sargent, CLM
 T. Lynn Sargent, CLM
 Sheila Sawyer, CLM, SHRM-CP
 Snezhanna Singleton, CLM
 Diane Taylor, CLM
 Judy Truglia, CLM
 Marcia Voth, CLM

MEMBERS MAKING NEWS*

- Committee on Diversity and Inclusion member Jessica Mazzeo wrote an article for *The Legal Intelligencer* (free digital subscription required) about employee satisfaction and engagement. She moderated a Philadelphia Chapter panel on the topic, which also touched on turnover rates and inclusion.
- Kathy Scourby, a Consultant and Vice Chair of ALA's International Relations Committee, wrote in *Law Practice* magazine about the scary statistics regarding business performance after a disaster and how crisis planning can help your company evade such ends. She previously discussed business continuity plans with the *Legal Management Talk* podcast.
- *Minnesota Lawyer* gave a positive write-up to the Minnesota Chapter's Diversity & Inclusion Committee. The publication particularly highlighted the committee's Law Firm Career Fair, an annual event designed to promote legal industry careers that don't require a law degree — and thus are more attainable than many high schoolers, particularly those in underserved areas, would expect.

*For the links to these articles, visit the online version.



OUR CONDOLENCES

ALA would like to express our sympathy to the family, friends and colleagues of Laurie Springer Brandon, who unfortunately recently passed away. She was a member of the Albany Chapter and the Chief Operating Officer of O'Connell & Aronowitz, PC, for 10 years. The firm has named the Laurie Springer Brandon Conference Room in her honor. Donations in her memory can be made to Northern Rivers Family of Services, which serves communities in the Capital Region.

Strategic Plan, Goal 4: Advance Legal Management Professional Development



ALA ended 2018 with its first-ever Summit Series (alanet.org/summit) webcasts, which featured interviews with legal management experts sharing some of the latest insights on the industry. The free-to-members series was launched over three consecutive Fridays in November and is currently available on demand. Each one-hour webcast includes interviews with two legal industry authors who share takeaways from their recently published books. As members, you receive discounted pricing on their books and other products that help enhance your career and improve the skills you use every day.

Hosted by Ari Kaplan, leading legal industry analyst and founder of Lawcountability, the first Summit Series featured:

- Jordan Furlong, leading analyst of the global legal market, discussing his book, *Law Is a Buyer's Market*
- Spencer X. Smith, digital marketing expert and Founder of Spencer X. Smith Consulting, sharing insights from *Rotoma: The ROI of Social Media 'Top of Mind'*
- Greg Satell, best-selling author and public speaker, talking about *Mapping Innovation: A Playbook for Navigating a Disruptive Age*
- Heidi K. Gardner, PhD, Distinguished Fellow at the Center on the Legal Profession at Harvard Law School, revealing strategies for *Smart Collaboration*
- Lee Broekman, Principal of Organic Communication, sharing key points from her book, *Stop Blocking, Start Connecting*
- Catherine Alman MacDonagh, JD, Founder of the Legal Lean Sigma Institute, giving tips on *Lean Six Sigma for Law Firms*

We also added three new white papers (alanet.org/whitepapers) to our collection. The latest is from James D. Cotterman, Principal for Altman Weil: "The Principles of Partner Compensation." It features solutions to address common challenges to making good compensation decisions.

Also available is "The Client Cost Conundrum: Legal Service Pricing in a Post-Recession Market." This white paper provides tips from clients, law firms and other legal industry leaders on how to develop and manage competitive pricing strategies. And Jennifer Hill — President of JHill's Staffing Services, a division of Marcum Search LLC — provides a role-based solution to address the significant changes impacting legal secretaries in today's legal environment in "The Changing Role of the Legal Secretary."

For more information on ALA's Strategic Plan and the progress we are making on it, visit alanet.org/about/about-ala/ala-strategic-plan.



We're heading to Texas for the 2019 Annual Conference & Expo. The venue, the Gaylord Texan Resort & Convention Center, is as beautiful as it is convenient: the all-in-one location on the shores of Lake Grapevine is just 10 minutes from the Dallas/Fort Worth International Airport.

This year, we'll be forging new frontiers in legal management through more than 70 educational sessions — including new, highly topical series about cybersecurity and pricing — and numerous opportunities to network with peers and business partners. The event takes place April 14-17; save by registering before the early bird deadline on February 4: alanet.org/conf19.

Let your most creative, ridiculous whims take over to produce a video for our annual *60 Seconds of Fame!* contest. You have until March 27 to write, record and edit a 60-second sketch or spoof — or even a sincere, heartfelt spot — that expresses the value you find in your ALA relationship. Members or business partners can compete on an individual or group basis; we often see chapters or regions banding together to compose a one-of-a-kind piece.

A stylized illustration of a round clock face. The clock face has a red-orange gradient with diagonal lines. It has a purple border. There are three stars in the upper right quadrant. The clock hands are white. The background is light blue with a yellow triangle in the top left corner.

This new, complimentary benefit for ALA members helps legal managers accurately describe duties for ever-evolving positions – increasing the chances they'll hire the right person for the job!

- Resources and tools for writing job descriptions – including an easy-to-use, editable template
- Guide to creating job descriptions that apply ALA's Uniform Process Based Management System (UPBMS) taxonomy



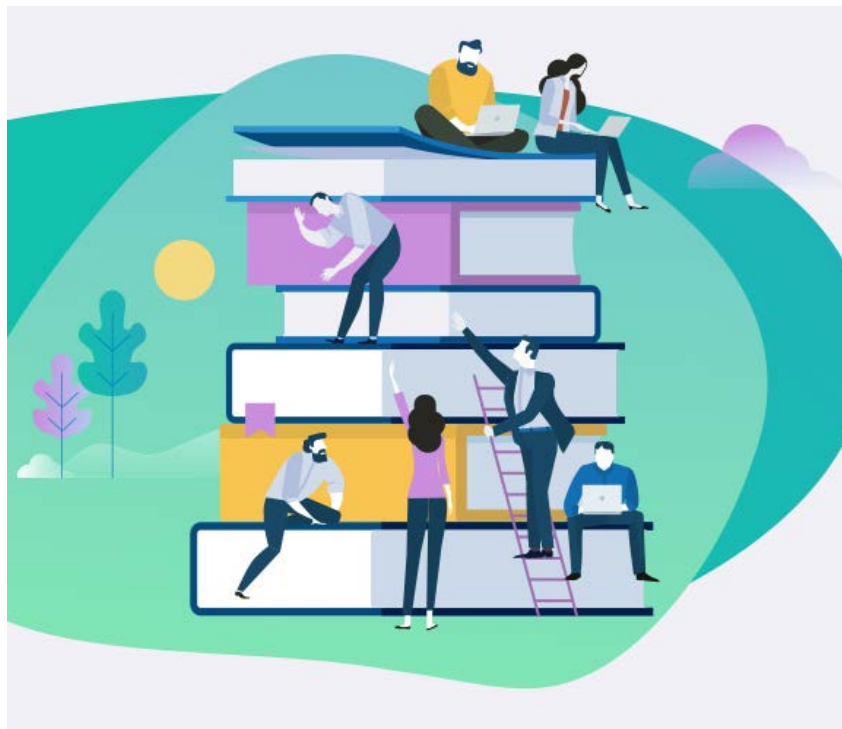
Improve your hiring process!
Better manage your employees' performance!

alanet.org/job-toolkit

ELEVATING YOUR EDUCATION EXPERIENCE THIS FALL

ALA is introducing two all-new, in-person event experiences for fall 2019. The first, C4: The Industry Conference (September 18-20, Boston), will employ design thinking and a more intimate format to produce member-informed strategic solutions. ALA Master Class: Leadership for Legal Management Professionals (October 21–23, Seattle) will dive into critical leadership skills that will benefit your personal career growth. Both events will provide new ways for attendees to discover better practices and interact with peers and business partners — at a lower price point and less time away from home and the office.

Learn more at alanet.org/events/save-the-date-19/2019-fall-events.



2019 WEBINARS OPEN FOR REGISTRATION

Next year's schedule features 40 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:

- 2019 Unlimited Pass: Delivers access to all the webinars
- 2019, 5 or 10 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: 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.

Check out our latest webinar offerings here: alanet.org/webinars.