

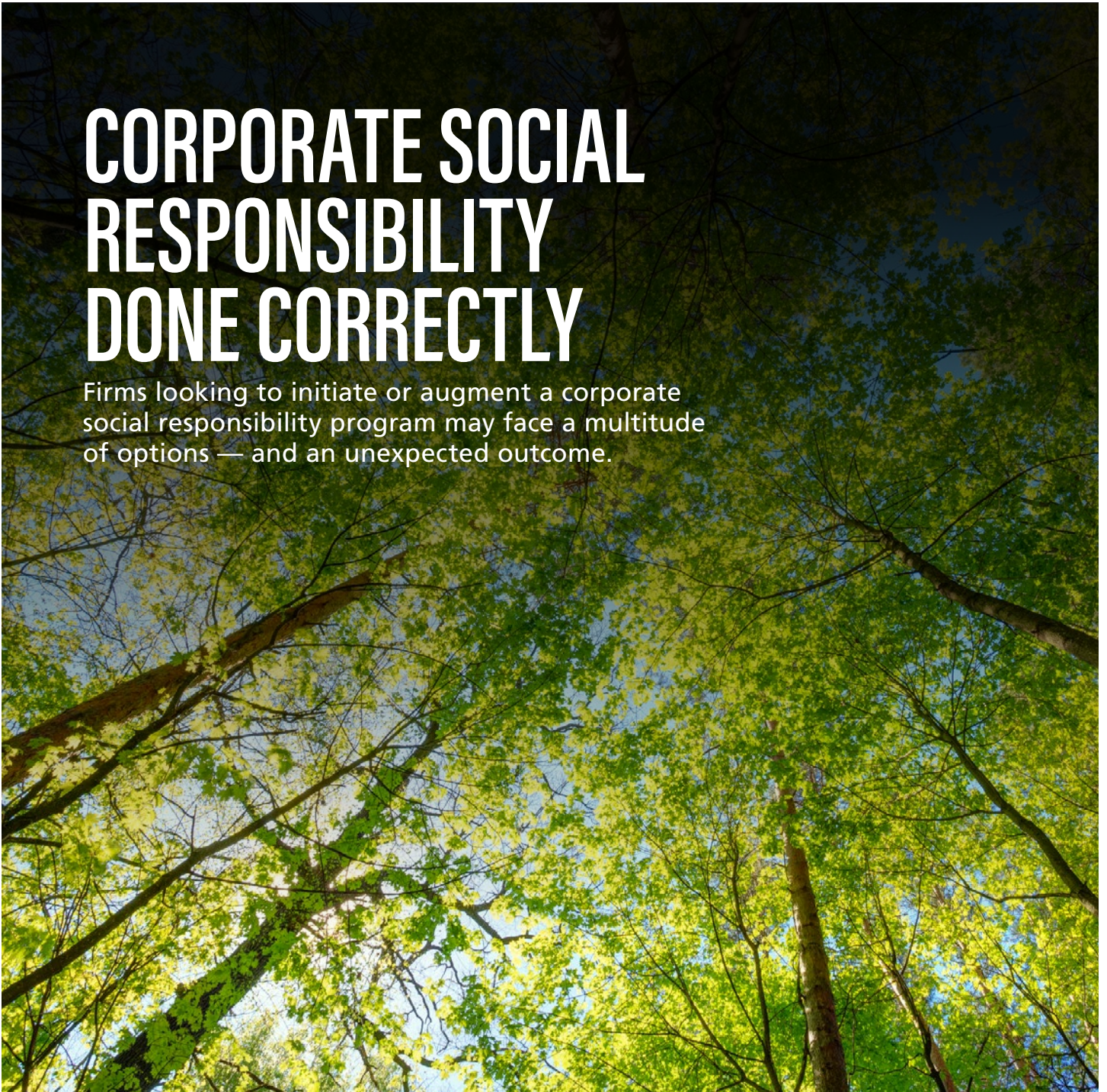
LEGAL MANAGEMENT

JULY/AUGUST 2018
VOLUME 37 • ISSUE 7

THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

CORPORATE SOCIAL RESPONSIBILITY DONE CORRECTLY

Firms looking to initiate or augment a corporate social responsibility program may face a multitude of options — and an unexpected outcome.





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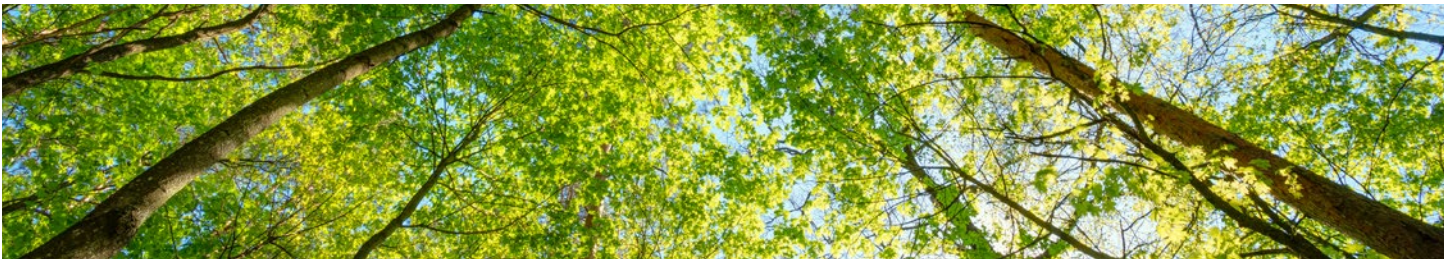
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“

We do so much planning in our daily roles that we do not even realize we are doing it sometimes.”

The Power of a Plan

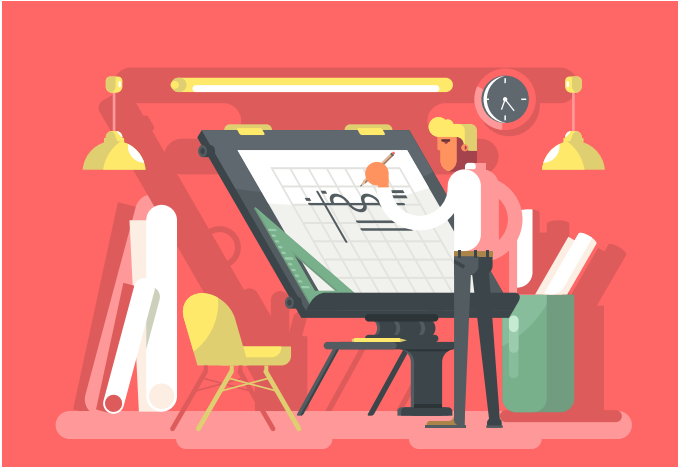
Every now and then, when I stop to take a breath and look to see what is next on my to-do list, it dawns on me how much I have going on in my life.

In addition to serving as ALA’s President and working at my full-time job at my new firm, I am raising my 10-year-old son as a single parent — making sure I volunteer at my son’s school, participate in local chapter events and just have fun. Most people who know me assume that I have a casual attitude about almost everything, and I am told that I rarely show any signs of stress. Do I get stressed out sometimes? Absolutely, and what gives me away is when something goes off the rails, I get quiet. I take a minute or two to gather my thoughts, and most of the time I realize I have several mini backup plans rolling around in my head. I am always a little surprised that they are swirling around in there, because I do not remember spending a lot of time creating them.

REHEARSING IN YOUR MIND

Over the years, I have trained my brain. Leave it to one of my son’s favorite shows, “Brain Games,” to tip me off about how this happened. The episode was about habits and how they are created. If you do something repeatedly, your brain and mind will continue to support and encourage the habit through neuroplasticity. The more you practice or rehearse something, the stronger your neural connections become. (This is also the scientific term that explains why we are all addicted to looking at our phones when our hands are idle, even though we just confirmed there aren’t any new emails in the inbox.)

I know you are all a lot like me. We do so much planning in our daily roles that we do not even realize we are doing it sometimes. “If I do this, then I will do this, or I could do this,” runs on a continual loop in my brain. I have created this loop because it is what has been essential for me to survive in this career. Contingency planning is a mindset, and it becomes a naturally occurring one when you do it often enough. Just because you are planning does not make you a worrier. It is possible to be a positive person yet constantly plan an alternative in case things do not work out. It reminds me of that favorite interview question



of some people I know, “Do you think you are lucky?” You create your own luck when you are ready for anything.

PLANNING FOR CONTINGENCIES

Is the rest of your management team in contingency planning mode? If not, you certainly want to circulate this issue of *Legal Management* throughout your office. It features an article by Affinity Consulting’s Debbie Foster and GLJ Benefit

Consultants’ Corry Johnson on the topic of succession and contingency planning. This is a great article about doing those mental exercises for the benefit of your legal organization. Do you know the difference between a succession plan and a contingency plan? After you read their article, you will — and you will also be ready to start thinking about all the “what ifs” and the positive outcomes that may follow.

The planning does not stop there. We should also have a contingency plan for ourselves. What is it that we need to know next to keep ourselves relevant in our roles? Are we collaborating with the right people? Have we looked outside our immediate environments? I am working on creating a new habit for myself and our Association — foresight. Sit tight until next time for thoughts on that topic! ■

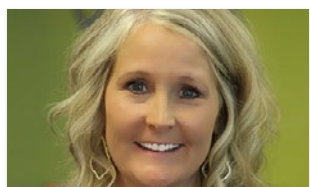
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EILEEN WHITAKER
Senior Learning & Change
Management Consultant,
Traveling Coaches

“

Competing DMS systems exist, so use is a choice. Outlasting the potential for regression requires a carefully crafted reinforcement strategy and a commitment to fully executing the plan.”

Outwit, Outplay, Outlast: Surviving a DMS Migration

I'm a die-hard "Survivor" fan! In the show's premiere episode, the host announced: "Sixteen strangers [will be] forced to band together, carve out a new existence, totally accountable for their actions — they must learn to adapt or they're voted off." This ultimate change experiment reveals what happens when different personalities must accomplish the same goals.

This concept got me thinking about the survival strategies law firms employ as they plan and execute their document management system (DMS) migrations. Here I will share tips from past survivors and give you the secret advantage to outwit, outplay and outlast.

OUTWIT RESISTANCE

In the game of "Survivor," those who outwit execute on the social elements of the game, such as emotional intelligence and building alliances. During a DMS migration, you will need to outwit resistance. People resist change for different reasons, and it can be expressed vocally or as apathy or indifference. You'll experience more acceptance taking these steps:

- **Form trusted alliances.** Develop a strong sponsorship coalition early on to lead the change. Engage supervisors and other key stakeholders, and have them help create the "why" story and provide input on the strategy and goals. They can provide assistance when people want to know what's in it for them.
- **Avoid the blindside.** People resist decisions imposed on them suddenly, so avoid the temptation to develop changes in secret. Instead, communicate early and often using multiple channels.
- **Invite others to the party.** Change can make people feel like they've lost control. Invite others into the planning, giving them ownership. Early employee involvement and input are key factors for adoption.

- **Minimize uncertainty.** If change feels like walking off a cliff blindfolded, then people will reject it. Create certainty with an inspiring vision from the right person of influence and with clear, simple steps and timetables.

OUTPLAY THE STATUS QUO

Outplay, in “Survivor” language, means you’ve worked hard to meet basic needs, win challenges and deal with the unexpected. Taking on a DMS migration means that change is necessary — to strengthen the firm’s security posture, enable mobility, promote collaboration or improve client service. To fully realize a return on investment and outplay the status quo:

- **Solve the right problem.** Identify competing systems in your environment and seek to understand why they are being used. Review service desk data and conduct interviews and focus groups to determine previous barriers to DMS adoption to ensure that you are solving the right problem.
- **Connect to the business.** Adoption increases when you explain “why” and “how” this is a business project rather than an IT project. Identify how this project aligns with the firm’s values and strategy.
- **Maximize user adoption.** Provide performance support tools. Identify obstacles in advance and remove them when possible.
- **Map and measure.** Define success and identify what measurements will indicate when success has been achieved. Well-defined metrics drive performance and provide focus. Take a baseline measurement to help show the growth.

OUTLAST REGRESSION

Outlast, the final phase of “Survivor” game play, is the most critical. The same people you outwit and outplay are now on the jury and must respect your strategy for you to win. Similarly, it’s not enough to outwit and outplay during a DMS migration. To institutionalize this change, you must outlast regression — so deployment doesn’t mean the end of work.

DMS migrations typically take place in tandem with information governance policy revisions. Therefore, user adoption of the system is critical to the overall risk posture of the firm. The challenge we are up against is that

competing DMS systems exist, so use is a choice. Outlasting the potential for regression requires a carefully crafted reinforcement strategy and a commitment to fully executing the plan:

- **Continue learning.** Develop a learning strategy with targeted workshops offered soon after deployment. Research shows that when we repeat information with timed intervals in between, it forces our brains to “retrieve” information and thus create new learning pathways.
- **Provide opportunities for feedback.** Keep the lines of communication open to seek feedback from those impacted. Share with others how the tool is being used.
- **Celebrate success.** Celebrate wins as you have them. That will help keep people motivated to continue the hard work that comes with big change.
- **Keep it up!** Until you can measure that people have changed their behavior for a sustained period, you can’t let up. Continue to use your sponsor coalition to reinforce the change’s necessity and benefits. Determine whether the initial business drivers for the change have been realized. Has profitability increased? Have client demands been met? Measurement shows you what’s successful and where you might need to go back and close gaps.

Successful leaders have shown that the key to surviving a DMS migration and bringing about maximum user adoption is executing a great strategy and having the grit to not give up. With these words of wisdom, you now have the edge to outwit, outplay and outlast! ■

ABOUT THE AUTHOR

Eileen Whitaker is the Senior Learning and Change Management Consultant at Traveling Coaches, where she partners with law firm stakeholders and learning professionals to develop strategies that maximize user adoption of technology-related business initiatives. She co-created the award-winning Certified Legal Trainer Program and won ILTA’s 2016 Distinguished Peer Award for Innovative Consultant of the Year.



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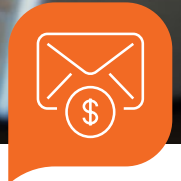
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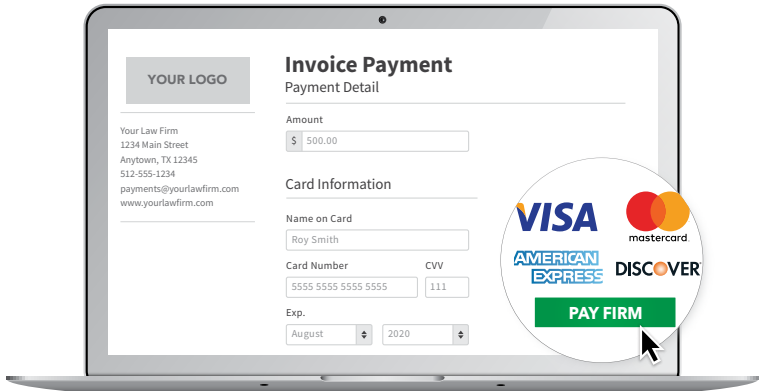
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Foster (left), Partner, Affinity Consulting Group
Johnson (right), Legal Financial Consultant, NextPath Legal

7 Key Steps for Successful Succession Planning

Succession planning can be a touchy topic for many attorneys. It's not just about retirement — it's a conversation about compensation, financial planning, professional identity, personal identity and physical health. Taking the "deal with it later" approach can make the firm unnecessarily vulnerable. But dealing with it now makes the lawyers feel vulnerable, because it forces uncomfortable conversations that they typically avoid at all costs.

A well-thought-out plan is not only focused on the planned exit from the practice of law (succession), but also the unplanned exit — temporary or permanent — from the practice of law (contingency). A firm typically has some time to plan for succession, but there is no time to plan after an unexpected event removes a lawyer from their practice. Prior proper planning allows for a reasoned response, while limiting the emotional strain that accompanies such events. For this reason, it is important for firms to take a thoughtful approach to these critical strategic issues.

There are seven areas that should be considered and worked into every plan:

1. SUBSTANTIVE LEGAL EXPERTISE

What kinds of work does your firm do where there is no backup? Is there additional training needed to ensure the firm is not put in a vulnerable situation if there is a contingency event? What is the long-term plan for each practice area? For smaller practice areas where fewer attorneys are involved, you should take a very close look to assess the firm's vulnerability.

2. CLIENT RELATIONSHIPS

Some say that people hire lawyers and not law firms. When a client's attorney is unavailable, the client is unlikely to trust the firm's other attorneys simply because they work for the same firm. It will likely take many years to show clients they can count on

other lawyers in the firm, so there is no time like the present to start nurturing each client's relationship with more lawyers in the firm.

3. REFERRAL SOURCES

Law firms are relationship businesses, and it is likely that many of your best new clients come from referral sources. Exploring ways to develop relationships with more than one person at the firm for your most valuable referral sources is therefore an invaluable investment. Again, this process will likely take years, so starting now is important.

4. COMMUNITY INVOLVEMENT

Whether it's giving back, community leadership or serving on a board, it is important that the younger attorneys in the firm recognize the value of these experiences and that the firm sets some parameters related to expectations for community involvement. Community involvement can be an important part of the firm's reputation, so be sure to invest the right amount of time and the right people in these activities.

5. FIRM LEADERSHIP

An unplanned exit of a managing partner, a practice area leader or even a management committee member can leave a leadership void. Identifying your future leaders and mentoring them early is a key to building a structure where the leaders of the future are well poised to step into a leadership role at the appropriate time.

6. INDIVIDUAL FINANCIAL PLANNING

Are your partners who are approaching retirement financially prepared to retire? Do you have a plan in place for your

partners to slow down? How will that plan affect the revenue they generate for the firm and their compensation?

7. FIRM FINANCIAL PROTECTION

Is your partnership agreement up to date? Do you have life insurance policies tied to a buy/sell agreement to protect the firm in the event of the untimely death of a partner? Have you considered long-term and short-term disability and long-term care insurance? Have you considered what would happen if one of your rainmakers is no longer able to practice? There are many ways you can protect the firm financially in the event of a key partner's unplanned exit from the practice.

The last item is particularly important. In the event of the untimely passing of an attorney, there are several financial considerations the firm must anticipate in addition to the business operations that need to be handled. The surviving equity partners will want to:

1. Retain control of the business without interference from the deceased partner's heirs.
2. Enact a prompt transfer of the deceased partner's interest at a fair price.
3. Preserve the loyalty and support of employees, clients and creditors during and after the transition in ownership.

All three goals are most effectively met through a buy/sell agreement that is funded by underlying life insurance policies on the equity partners. A formal, written buy-sell agreement:

1. Establishes a fair price for the business interest and terms of sale that are acceptable to all parties.
2. Establishes a value for estate tax purposes, which helps avoid estate settlement delays and IRS challenges.
3. Establishes the basis for determining the amount and funding of life insurance needed to fund the purchase of the business by heirs or others.
4. Encourages confidence in the ongoing vitality of the business in the eyes of clients, creditors and employees.

In many cases we see firms that have either the buy/sell agreement or the life insurance in place, but not both. Just life insurance without the benefit of a well-thought-out buy/sell agreement can cause more problems than it solves; the agreement is what governs the transfer of the equity back



to the firm, establishes the method of valuing the firm for purposes of the transfer, and protects the firm and surviving partners from litigation from the deceased partners heirs as well as IRS challenges to valuation. It is highly recommended that you work with an attorney outside your firm who is experienced in this type of work to bring the objectivity needed to this type of agreement. You should also be working with an experienced insurance agent who understands the intricacies of the following:

- Various types of buy/sell agreements
- Key person policies
- Disability insurance policies
- Specialty policies like business overhead expense policies




While these issues are critical when it comes to the lawyers in your firm, be sure to also think through your succession and contingency plan for paralegals, support staff, firm administrators, IT directors and any other key positions in your firm. Tackling these issues has benefit beyond the security of knowing how to respond when an attorney leaves the firm. The organization required for succession and contingency planning will also set up the firm to work more efficiently and effectively now. Younger lawyers interested in their own careers are excited to work for firms that are actively planning, where they understand their path to equity and leadership. Succession planning can also help identify lawyers who should not be part of the firm's future and can help nip potential issues in the bud.

None of this gets fixed overnight — most issues take months or years to fully address. Succession and contingency planning must then become part of your culture. When you hire someone, when people move to a new practice group, when family situations change, when health issues arise, be sure to think about how those situations affect the firm's succession and contingency plan. The creation of your plan is not a





one-time event. A planning mindset is the best way to put your firm in the best possible situation when issues, both unexpected and expected, arise. ■

ABOUT THE AUTHORS

Debbie Foster is a nationally recognized thought leader on management, efficiency and innovation in professional legal organizations. Her 20-plus years of experience — combined with a mix of strategic management and strong leadership skills — has enabled her to work with law firms and legal departments to help them navigate the ever-changing legal services delivery landscape. Foster has been working with law firms and legal departments since 1995, earned her Lean Six Sigma Certification and is relied on by firms all over the country as a management consultant.

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PREPARING FOR THE ROAD AHEAD



ALA members have access to a new, exclusive benefit from GLJ Benefit Consultants and Affinity Consulting to help take some of the pain out of succession planning. NextPath Legal is available to ALA member firms with five-plus attorneys. Included in this benefit is all-inclusive written succession and contingency plan. Learn more about this exclusive ALA member benefit: www.nextpathlegal.com.

Facts & Stats



CORPORATE SOCIAL RESPONSIBILITY A SELLING POINT FOR MILLENNIALS

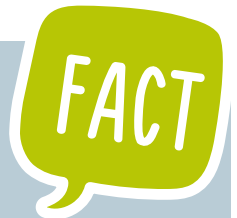
Thirty-nine percent of Millennials research employee volunteering and other charitable work before interviewing with an employer; 55 percent who were told about cause-related corporate philanthropy during their interview say it helped convince them to take the job, according to a report from the Case Foundation.

Read more about the benefits of implementing CSR programs at your firm in this issue's cover story, "Corporate Social Responsibility Done Correctly."

FACT: MOST FIRMS AREN'T PLANNING FOR SUCCESSION

By 2020, more than half of the legal workforce will be age 55 or older. Only **26 percent** of law firms have succession plans in place.

Is your firm ready? Check out this month's Innovations column, "7 Key Steps for Successful Succession Planning," and learn more about the new program that can help guide you through the process — a benefit that's exclusive to ALA members.



REPRESENTATION OF WOMEN CONTINUES TO LAG AT ALL LEVELS OF U.S. LAW FIRMS

- Just more than 12 percent of law firm leaders are women. That said, the average representation of female attorneys at firms with a woman in a leadership role is 3 percentage points higher than the average of all firms surveyed, and representation of female equity partners at such firms is 5 percentage points higher.
- While women of color made up nearly one-fifth of first-year law school students in 2017, this report shows that only 8 percent of private practice attorneys and 3 percent of law firm partners — either equity or nonequity — are women of color.
- Just 36 percent of all attorneys are women, even though women have comprised more than 40 percent of law school students for more than three decades. At the partner levels, the representation of women shrinks even further. Just more than 23 percent of law firm partners — either nonequity or equity — are women.

To read more about how to make sure the women in your firm are being heard, check out our January 2018 cover story, "Empowering Women in the Workplace."

Source: 5th Annual Glass Ceiling Report, Law360



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The Lateral Leap

Properly integrating lateral partners into your firm is critical to their — and your firm's — success.



KYLIE ORA LOBELL
Freelance Writer

Your law firm is on the lookout for new partners, and you've decided to do some lateral hires rather than promote internally. Integrating these lateral partners into your law firm takes time, money and extensive training, but the benefits of bringing talented members to your team — not to mention the valuable clients — pay off in the long run.

Unfortunately, it can be difficult to effectively onboard these lateral partners. According to a study by ALM Rival Edge, 47 percent of lateral partner hires do not stay a full five years at their firms. Considering that it takes a few years for hires to be trained — and another few years for firms to recoup recruiting costs and compensation-above-contribution — firms are losing money on these hires.

If you carefully plan for the arrival of these hires, ensure they are properly brought into the company, give them a team to guide them and invest time and money in them, you will have a thriving and efficient law firm for years to come. Here are some tips on how to integrate lateral partners.

INTEGRATE RIGHT AFTER HIRING

You don't want to start integrating your new partners on their first day. Instead, plan ahead and begin the process as soon as you hire.

“Even in interviews, culture and firm focus is discussed. We start the integration process from the moment that the offer is accepted, and we have learned that sometimes that is not enough time, depending on their situation upon leaving their firm.”

“Even in interviews, culture and firm focus is discussed,” says Lori Hughes, Lead Operations & Information Security Officer of Miller Nash Graham & Dunn LLP and member of ALA’s Oregon Chapter. “We start the integration process from the moment that the offer is accepted, and we have learned that sometimes that is not enough time, depending on their situation upon leaving their firm.”

GIVE MORE THAN HR POLICIES AND A HANDBOOK

As Hughes notes, it is crucial to go over company culture. Eric Dewey, Principal at Group Dewey Consulting, also believes that communicating culture is important. Instead of just giving the new hires some materials to go over, provide them with a real glimpse into how your firm operates.

“Most firms rely on their hiring agreement and the HR manual to convey expectations to the lateral,” says Dewey. “But those are typically economic expectations and policy mumbo jumbo that the busy onboarding lateral is not likely to read. Left out of the equation too often are critical sociocultural expectations that make up a firm’s culture and that can make or break a lateral’s success.”

ASSIGN A LATERAL INTEGRATION MANAGER AND TEAM TO THE NEW PARTNER

New hires cannot be left out in the cold and wondering how to properly integrate into the firm on their own. Instead, they need guidance. Showing the lateral partner the ropes of the firm — whether it’s your HR policies, culture, expectations or workflow — should fall into the hands of a team.

According to Hughes, this team will “provide information to the onboarding member(s), including introductions to key stakeholders (e.g., managing partner, key team members, administration); determine technology and training needs and expectations; discuss their experience and expectations of working with support staff; [and] discuss client/matter intake for clear client transitions.”

In addition, Hughes will give the lateral partners the dates for key upcoming events at the firm, as well as cultivate social

opportunities for them to meet other staff members and attorneys in their offices and the offices at large.

CONSTANTLY TRAIN YOUR LATERAL PARTNER

You want your lateral partners to gain new skills, fit into your firm and bring their own clients aboard. Providing ongoing training is going to guarantee that it is an easy transition.

“We expect that they will spend their first few days in the office getting connected with the firm and working to move any clients to the firm so that the client experience is as smooth as possible,” says Hughes. “We continue to work on improvement in this area each and every time. Our firm is constantly training and upskilling.”

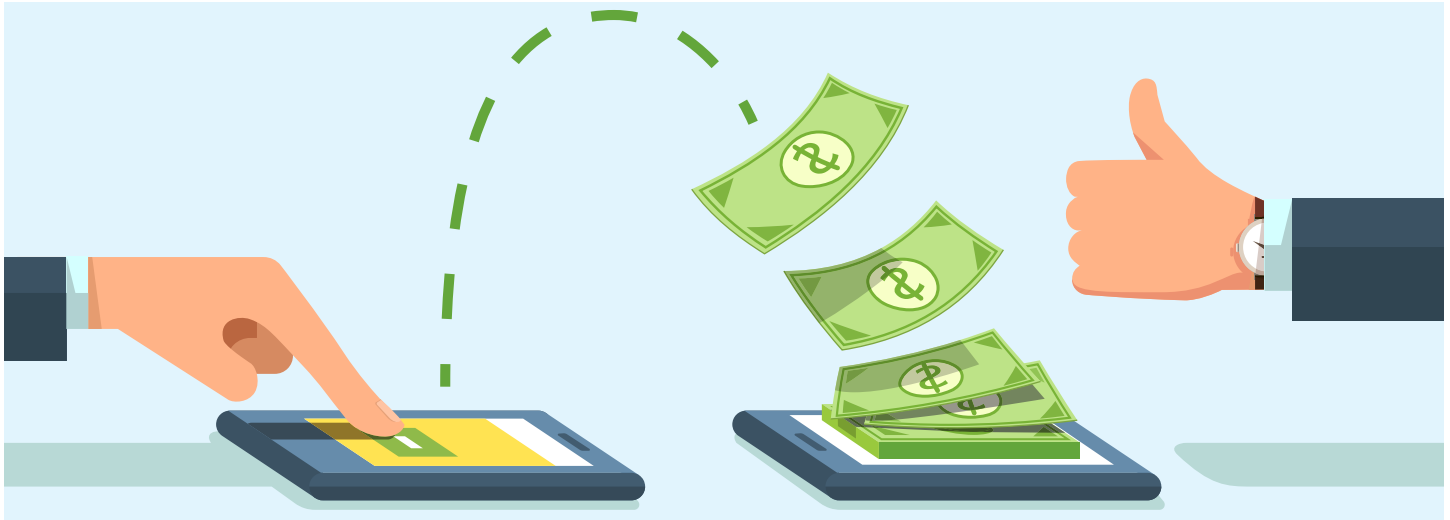
“Left out of the equation too often are critical sociocultural expectations that make up a firm’s culture and that can make or break a lateral’s success.”

BE FLEXIBLE WITH YOUR EXPECTATIONS

One lateral partner is going to be completely dissimilar from another, depending on their background, experience and many other factors. Sharon Meit Abrahams, EdD, Director of Professional Development/Diversity & Inclusion at Foley & Lardner LLP, says that every lateral is different, so the integration goals must be adjusted.

“An attorney who joins from the government doesn’t have a list of clients right off the bat, but they should develop a list of prospective clients that the new firm should help them with,” says Abrahams, who is also a member of the South Florida Chapter. “It could take up to two years to see any clients come through the door. Their expected trajectory is very different than an attorney who joined with one or two clients who followed them to the new firm. An attorney with a client base, even a small one, should begin to see positive results within a year.”

“It could take up to two years to see any clients come through the door. Their expected trajectory is very different than an attorney who joined with one or two clients who followed them to the new firm.”



ALLOCATE MONEY WHERE IT'S NEEDED

Lateral partners need time and money to transition their clients into the new firm. Give them the resources they require to do this well, says Dewey.

“Laterals will want to visit their clients, bring them swag, dine them, wine them and hopefully sign them. That doesn't always happen immediately and sometimes requires multiple client visits, client incentives, travel time and the participation of other partners,” says Dewey. “Make sure you've allocated enough business development resources to the lateral so they can do what they need to do to get their clients in the door. Make resources available but also manage the time and the firm's expectations.”

GIVE IT TIME

It may take longer than you expect to fully assimilate your lateral partners. Hughes says their integration usually continues for several months as the hire builds relationships within their firm.

“They may have mentors assigned to help them within their practice team, to engage with other attorneys and staff throughout the firm, and [to navigate] workflow, but they will also develop mentors organically who they choose and who support them through the process. Those development pieces of integration do not happen overnight,” says Hughes.

According to Dewey, it may even take years for the integration to complete. An integration manager should create check-in or progress-reporting deadlines, and there should be people mentoring, coaching and guiding the hire throughout that time.

“Planning for the integration of a new partner is a series of distinct activities and plans which all must be implemented quickly and seamlessly,” Dewey says. “But in all of these plans, strong and consistent communication is the key to the successful integration of lateral partners.” ■

ABOUT THE AUTHOR

Kylie Ora Lobell is a freelance writer living in Los Angeles. She covers legal issues, blogs about content marketing, and reports on Jewish topics. She's been published in *Tablet Magazine*, *NewsCred*, *The Jewish Journal of Los Angeles* and *CMO.com*.



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Corporate Social Responsibility Done Correctly

Firms looking to initiate or augment a corporate social responsibility program may face a multitude of options — and an unexpected outcome.



ERIN BRERETON
Owner, Chicago Journalist Media

A number of firms have, for years, supported pro bono programs; 81 percent of attorneys say they've provided related services at some point in their career, according to a recent ABA survey.

"Comprehensive corporate social responsibility (CSR) programs that encompass a variety of projects and causes are a newer concept for many firms. In recent years, though, more have incorporated initiatives that address community, environmental and other issues, according to Aileen Bleach, Pro Bono and Corporate Responsibility Manager at 400-attorney firm Eversheds Sutherland LLP.

"The practice of law firms having a CSR effort is growing," Bleach says. "Early on, at many firms, large ones in particular, pro bono work was often the focus. Volunteering can tie in with that — and people are starting to expand into CSR specialty areas."

AN ASSORTMENT OF CSR

Law firm corporate social responsibility elements can vary from financially or physically helping a local charity to programs that have an international impact.

“For professional service firms, CSR is now encompassing a much wider range of issues, from carbon footprint reporting to looking at risks in the supply chain.”

Firm members may roll up their sleeves and, as Eversheds Sutherland employees have, spend a day building homes for Habitat for Humanity. The firm’s offices also have pro bono committees that employees can opt into and assorted volunteer opportunities that board members, leadership and other firm employees have suggested.

Numerous firms’ programs feature a focus on sustainability. For example, all food that’s thrown away in the cafeteria in Baker McKenzie’s London office is weighed, composted and assessed to determine future ways to further reduce waste, according to Director of Corporate Social Responsibility Christie Constantine.

“They’ve changed the way they serve food and portion sizes and timing of when they put things out,” Constantine says. “It’s a very sophisticated recycling effort. They do a lot of education in that office so people understand why and how to support the program.”

Some of the global, 4,000-plus-attorney firm’s offices have also installed bike racks and subsidized bicycle purchases to encourage employees to bike to work.

Sixty-attorney Denver firm Moye White supplies transit passes to encourage employees to take the bus instead of driving. Although Equity Partner Dominick Sekich says the environmental aspects of the firm’s CSR program have been some of the most challenging to gain direct results from, the firm has been able to make a number of adjustments.

“The simplest efforts for us were looking at how to address employees and engage the community,” he says. “The area we found difficult was thinking about opportunities to improve where there would be a reasonable [effect] on the environment. There are still tweaks you can make, like creating a default for every printer to print both sides to reduce paper usage — small things actually have an impact.”

CSR initiatives can also include diversity and inclusion and human rights concerns that relate to both employees and other entities the firm interacts with.

Baker McKenzie, which signed on to the voluntary United Nations Global Compact initiative in 2015, has set aspirational gender targets for partners and principals and worked to provide more comprehensive sponsorship and mentorship opportunities, according to Constantine.

“There’s a commitment in the UN Global Compact to actually align operations with 10 principles around human rights, fair labor and anti-corruption,” she says. “For professional service firms, CSR is now encompassing a much wider range of issues, from carbon footprint reporting to looking at risks in the supply chain. The breadth of issues has definitely broadened.”

RUNNING RESPONSIBILITY

Some firms have an attorney or team manage projects — or create a role specifically to oversee CSR. Bleach’s position has existed for more than 13 years at Eversheds Sutherland, which also recently hired a pro bono administrative assistant to help manage its variety of charitable projects.

For Moye White, the social and environmental performance, accountability and transparency standards involved in applying for B Corp certification from the nonprofit B Lab organization — which the firm obtained in 2014 — helped provide a template for its CSR program. Certified B Corporations have to meet the highest standards of verified, overall social and environmental performance, public transparency and legal accountability.

“A large, 2,000-attorney firm might have the luxury of developing a specific program policy and identifying a partner or executive who can actually be responsible for CSR,” Sekich says. “As a mid-sized firm, B Corp certification was an accessible way for us to try in an organized fashion to address our CSR goals.”

Once a program is up and running, individual CSR project suggestions may come from various sources. Eversheds Sutherland’s volunteer work often involves projects that an organization’s board members or leadership are passionate about, according to Bleach. Employees, too, offer ideas, and its offices have pro bono committees that employees can opt into.

“In the last 5 to 10 years, CSR was very much a write-a-check-or-sponsor-events [situation]; firms are taking a more grassroots approach now and not just giving money, but their time.”

To encourage staff members to participate in its CSR endeavors, Moye White offers paid time off to attend volunteering outings it has identified.

“For a firm our size, that’s a meaningful commitment,” Sekich says. “We try to [offer] diverse opportunities; if someone isn’t interested in helping at a homeless shelter, you have the opportunity to go outside and help build a trail.”

Providing volunteering options can also help with program oversight, according to Sekich.

“You’ve got to measure the impact — otherwise, there’s no point in having a CSR program,” he says. “The best way to do that is to have these opportunities be more or less formal. Employees don’t have to hunt for them, and it’s also easier to track commitment.”

THE SURPRISING CSR EFFECT

Robust CSR programs can be a significant selling point for Millennials, who research indicates value community involvement.



Thirty-nine percent of Millennials research employee volunteering and other charitable work before interviewing with an employer; 55 percent who were told about cause-related corporate philanthropy during their interview say it helped convince them to take the job, according to a report from the Case Foundation.

“I’ve heard from our colleagues who handle recruiting that they pretty consistently get asked [about CSR], especially by law students or recent graduates,” Constantine says. “Our Belfast office, for example, opened a few years ago in a very competitive talent market. Part of its proposition to attract talent was an ethos of volunteering and community service.”

CSR efforts can also, according to Bleach, help positively influence firm culture.

“You’ve got staff and attorneys building a house together [at Habitat for Humanity] — that makes it very collegial,” she says. “How you interact, how you enjoy your time with people when you get to work on different types of projects together — there’s incredible value in that.”

Clients also care about CSR. While it’s not as influential as price or responsiveness, in-house counsel say corporate social responsibility is a bigger factor in whether they choose a legal supplier than personal relationships, according to a 2017 Thomson Reuters survey.

“We’re seeing a big uptick in clients asking us to tell them what we’re doing,” Constantine says. “When I first started, it was kind of unheard of to ask about our carbon footprint; now we’re getting requests fairly regularly. There’s an expectation you’re doing those things.”

OFFERING SUPPORT FOR THE RIGHT REASONS

The main motivation for undertaking CSR efforts should be, and in most cases is, because it’s the right thing to do.

CSR programs may, however, inadvertently offer some advantages — including helping firms more effectively manage talent and succession plans as managers

"You've got to measure the impact — otherwise, there's no point in having a CSR program. The best way to do that is to have these opportunities be more or less formal. Employees don't have to hunt for them, and it's also easier to track commitment."

approaching retirement pass the corporate social responsibility reins to younger attorneys, according to Emily Frickey, Director of Digital Operations at legal marketing agency Network Affiliates, which has advised firms on CSR.

"Having some of the older principal attorneys helping to guide them allows them to grow in the space," Frickey says. "It's very much, 'Let's see how they do handling something like this and still managing to be a practicing attorney.' It's indicative of if they can handle more — and do they want to handle more."

Highlighting a firm's dedication to volunteer work can help potential job candidates, clients and the outside world, in general, understand the firm is committed to being a principled, socially responsible service provider — which, in today's increasingly competitive legal market, may not be a bad thing.

"In the last 5 to 10 years, CSR was very much a write-a-check-or-sponsor-events [situation]; firms are taking a more grassroots approach now and not just giving money, but their time," Frickey says. "There are a ton of attorneys advertising every time you turn on the radio or TV — how do you stand out? CSR is a great way to do that. Showing you care goes a long way with people." ■

ABOUT THE AUTHOR

Erin Brereton is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

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SPREADING THE WORD ABOUT PHILANTHROPIC WORK

A study of the top 100 English firms' websites found the majority mention their corporate social responsibility efforts — not all firms, though, in or outside England share CSR-related content with the public.

Many who do use social media, according to Emily Frickey, Director of Digital Operations at legal marketing agency Network Affiliates.

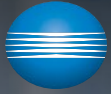
"Gone are the days of press releases. Some still do that, but [it's generally] a very social interactive piece," Frickey says. "Facebook, Twitter and Instagram are the three biggest hitters, in terms of getting CSR out there."

For firms trying to reach a Millennial audience of potential employees or future clients — who research indicates places a strong emphasis on CSR involvement — sharing information on social media can be an important move.

"Social media has been a huge catalyst for firms to understand they can reach the demographic and say, 'We really do care about the community,'" Frickey says.

Conveying CSR info internally can be an additional challenge. To ensure firm members know what opportunities exist, Eversheds Sutherland LLP shares information on a blog created specifically for pro bono and corporate responsibility updates.

"Somebody can't say they had no idea someone in the Atlanta office was doing work they would've loved to get involved with," says Pro Bono and Corporate Responsibility Manager Aileen Bleach. "We can talk about projects we're doing in other offices so people can join in. We're trying to be more interconnected about it."



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Making Your DMS Migration (Relatively) Painless

Experts weigh-in with tips for a seamless transition



JOBST ELSTER
Head of Content & Legal Market
Strategy, InsideLegal

Document management systems (DMS) are mission critical for firms. It's understandable why the thought of implementing a new system or upgrading your current one can make your heart palpitate.

For all the questions, issues and pitfalls associated with DMS implementations, there is an equal abundance of best practices, proven tips, recommendations and success stories that will help your firm not only survive your current DMS install but hopefully make it thrive.

Jason Scott is a Senior Business Consultant with Tikit and has worked on 200-plus DMS firm implementations across the globe. His advice comes down to several key phases. "Plan it, design it, build it, test it, communicate to the business what 'it' is, learn it and then roll it out," he says. He also emphasizes the importance of having clear objectives going into any migration project, and, at the end, ensuring all objectives have been met. "This might sound trite, but you'd be surprised how often objectives don't match up."

To help navigate this process, we reached out to some of the leading minds (and hands) when it comes to legal DMS implementations, migrations and upgrades. Our panel consisted of 21 experts, with a total of 2,848 law firm DMS projects under their belts, representing

“Be sure to involve your attorneys and staff in some of the user interface and workspace designs, to ensure their workflows are considered and their ideas are heard.”

16 of the leading DMS implementation, support, training, design, configuration and software solution providers. We asked them to complete a short survey focused on DMS deployment types, DMS implementation provider selection, tips for successfully navigating a DMS upgrade, and top reasons why DMS implementations (still) fail.

Let’s dig in to the results.

In order to provide an adequate technology baseline, we asked our experts — who collectively serve a broad range of small, medium, large, mega and global firms — to state the type of DMS projects they had been involved with over the past 12 months. A total of 95 percent had worked on cloud-based DMS implementations followed by 71 percent working with on-premises DMS to cloud upgrades; 57 percent worked with on-premises implementations. Above all else, this reflects a trend that has been almost a decade in the making — law firms of all sizes are embracing the cloud, especially when it comes to their document management needs.

ENSURING IMPLEMENTATION SUCCESS

The first order of business is critical: selecting and vetting the right provider. According to our expert panel, the top five attributes and qualities to look for in a DMS implementation partner include the following:

- Reputation (86 percent)
- Peer feedback/what are other firms saying (76 percent)
- Track record (71 percent)
- Overall value (67 percent)
- Cloud experience (57 percent)

Additionally, several respondents cited the importance of finding a technology and business partner that is knowledgeable in the areas of information governance, change management, system design and user experience — and possesses the technology certifications and credentials to back it all up.

Change management is especially key so that the staff sees the migration through a holistic lens. Another reason

consistently cited for DMS implementation failure is that the lack of change management and the overall perception that they are dealing with a technology, not a business, issue.

“IT-led projects focus only on the technical conversion issues,” making the point that a myopic, IT-only view might make it more difficult to effect broader change, notes Michael Georgopoulos, eSentio’s Director of Document and Information Management Systems.

“Above all, perform a pilot migration with the firm’s data. This will allow the firm to see the results of their design and the migration process to confirm it is what they expect.”

Viewing it only as a technology project fails to see the larger picture of how the system impacts business for the entire firm. It can also make another critical factor for success that much more difficult — leadership and staff buy-in.

“Be sure to involve your attorneys and staff in some of the user interface and workspace designs, to ensure their workflows are considered and their ideas are heard,” says Brian Podolsky, Practice Leader at Kraft Kennedy.

Matthew Marcinek, DMS Team Manager and Solutions Architect at All Covered, also feels strongly about leveraging data found in existing systems and analyzing the data at hand to make informed decisions. “Above all, perform a pilot migration with the firm’s data. This will allow the firm to see the results of their design and the migration process to confirm it is what they expect.”

Others stressed the importance of user adoption, DMS usability and designing DM systems with adoption at the forefront. “With cloud services, the focus is now on designing for adoption and getting full value from the platform,” says Joshua Fireman, Founder/President of Fireman & Company. “System design should involve IT and

“People are not going to just know how to use the new program. Be sure to provide sufficient *ongoing* training for your team. Training is not a onetime event.”

KM [knowledge management] and include input directly from lawyers.”

Related to user adoption is user training. Most survey responses mentioned the need for training throughout the entire process, even before migration gets underway ... and well after it's been implemented. “People are not going to just know how to use the new program. Be sure to provide sufficient *ongoing* training for your team,” Debbie Foster, a Partner with Affinity Consulting Group. “Training is not a onetime event.” She specifically cites training as a definite DMS success factor.

As evidenced by our expert conversations and survey feedback, communication breakdowns are more often than not the source of DMS projects gone bad.

According to Jeff Alluri, Principal and Vice President of Consulting with Element Technologies, DMS needs and the overall business case are not always clearly spelled out. “The message as to why we are choosing a DMS needs to be clearly understood by everyone within the law firm,” says Alluri. “With that being said, communication both internally at the law firm and externally with the selected DMS vendor

is vital, and many times one or both of these are dropped or there is simply not enough of it.”

FORGING AHEAD

OK, so much of what is wrong with DMS projects is most definitely also what's right. Approach each project with a well-thought-through plan; over-communicate objectives, expectations and outcomes across all project constituents; pull in your lawyers early and often; test and test again; and make your most vocal firm partner your DMS project champion. ■

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Jobst Elster is InsideLegal's Head of Content and Legal Market Strategy. He has served as a legal market strategist for the last 19 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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Sony's Aibo: The Future of AI and Robotics?

As you know, we really love our tech gadgets, but we love our pets, too. If you have ever seen the Bill & Phil Show, you know that we always include something in the presentation that merges these two loves.

“ Sony is clearly hoping its new robot dog will demonstrate its commitment to being a major player in robotics and artificial intelligence.”

We told you about the ZenCrate, a Wi-Fi-enabled dog house that promises to relieve your pooch's anxiety during even the fiercest of storms with calming noises and vibration tamping. And for those wayward pets who like to escape their owner's leash, we sampled the Kyon Pet Tracker, a fancy collar with a GPS tracker and barking silencer, plus a smartphone app for the human. And, of course, Bill loves his Litter-Robot III, a self-cleaning smart litter box for his kitties.

This pet tech is wonderful — if you actually have a pet, that is. What about the busy professional who lives in an urban environment, works irregular hours and travels a lot? Or an elderly person who physically can't take care of a pet? Or even someone who has a pet allergy? Sony's Aibo robotic dog — which we saw at the last Consumer Electronics Show — is the perfect “companion” for the busy urbanite who wants to bond with a pet without all the, uh, pet mess.

MAN'S BEST FRIEND?

Up close, our first impression of Aibo was that it looks like a toy. But once it becomes animated and begins to walk, run, wag its tail, look around, roll over, etc., you start reacting as you would with a real pup. This “new” robotic dog is actually just a reboot of a model that Sony introduced back in 1999. This new Aibo is a huge improvement, but it remains to be seen if it will be a hit with its \$2,000 price tag and \$25 a month maintenance fee. (Nobody said robotic pets would be any cheaper than real ones!)

Sony is clearly hoping its new robot dog will demonstrate its commitment to being a major player in robotics and artificial intelligence. This technology gives Aibo its lifelike characteristics.

Thanks to enhanced robotics, Aibo's movement is more like that of a real dog; it interacts and "grows" due to AI technology that is continually learning and updating the robot's database of knowledge (hence the monthly fee for maintaining your dog's intelligence in the cloud).

For example, Sony says Aibo can learn to recognize the humans who interact with it the most. Aibo has embedded cameras that enable it to navigate around obstacles in your home and to recognize familiar faces. Just like a real dog, Aibo is responsive and can grow "tired" after lots of activity. This "tiredness" is actually caused by a depleted battery after about two hours of play. It navigates its way back to its charging base when it starts feeling lethargic and, after "resting" for a while, is ready to play again.

We saw a demo at CES that involved two robotic dogs, and the way they interacted and played together mimicked real dogs pretty convincingly. But, of course, they can be unpredictable just like real pets, such as when one of the Aibos inexplicably ignored a command from its human master. Was that a misfire or just a prank that a real pet might pull? We're not sure, but we think it was an error due to the spotty internet on the crowded exhibit floor.

A GLIMPSE INTO OUR FUTURE

While the idea of Aibo as a pet replacement seems far-fetched and expensive, we believe this revamped Sony project represents a new era of robotics in the world of tech gadgetry. Aibo demonstrates that it is possible to provide a rewarding companionship experience using robotics and AI. We expect to see many more robots in the near future that can be used



to help entertain and teach children or provide basic care and companionship for the elderly. With any luck, we'll be able to retire with an army of robot pets and caregivers who can provide us with company and comfort well into our golden years. ■

ABOUT THE AUTHOR

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

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CN1018-37928-1119D - 2017

GDPR Compliance and Why It Matters to Your Law Firm

By Ann Nickolas



As law firms need to store confidential assets from client depositions, discovery documents, plaintiff statements and corporate information, they continue to be prime targets for information breaches. Firms work to protect against breaches and attempt to keep up with a rapidly changing industry landscape; however, the ways they collect, store and destroy sensitive information is increasingly scrutinized. And inspection of data security practices intensified when the General Data Protection Regulation (GDPR) came into effect on May 25.

While many firms have taken steps to safeguard confidential information, many have not — which leaves their clients and employees at risk of identity theft and data breaches. GDPR, which affects organizations that collect or process data from residents of the European Union (EU), is forcing law firms

to re-evaluate and restructure data security operations and procedures. To help all employees comply with new regulations, law firm leaders should consider the following recommendations.

CREATE AN INFORMATION SECURITY HANDBOOK

It's helpful to create an all-encompassing security policy that can be used as a reference for all employees within the firm, especially when new legislation is in play. And with 25 percent of information breaches caused by employee error, it's evident employees need a better understanding of information security best practices.

The handbook should be regularly updated to reflect new laws. As it relates to GDPR, the handbook should explain that any employee who obtains information from EU residents must keep a record of the category of data collected or received and document how long the data has been stored before being securely destroyed. Therefore, the guidelines should detail the safest information storage and disposal methods for both physical and digital data. Hard-copy documents that need to be stored should be kept in secure, locked filing cabinets. Documents that need to be discarded must be securely shredded first.

OFFER ONGOING TRAINING

As a first step, have accessible guidelines in place to create a culture committed to data security. When employees are facing regulation changes and policy alterations, it's especially important that everyone has access to experts within the firm. Thus, offering in-person guidance and training gives employees the opportunity to ask questions that might not be answered in the security handbook and inform them about resources that are available.

Under GDPR, affected organizations with more than 250 employees must appoint a data protection officer (DPO) who is equipped with knowledge of data protection laws and procedures. However, law firms of any size should appoint someone to lead information security and act as the main point of contact. This representative would be responsible

Developing an environment that prioritizes data security is key to mitigating risk and ensuring that employees are equipped with the knowledge to maintain compliance.

for monitoring the firm’s day-to-day operations to ensure all is functioning in accordance with data security standards set forth by GDPR and other regulations. Further, affected businesses must introduce Privacy Impact Assessments (PIAs) — a critical component of GDPR that provide ongoing evaluations and identify where an individual’s data could be at risk throughout its processing.

While an organization is in the early stages of adjusting to GDPR, it’s helpful to consult with third-party counsel or information security specialists to ensure that any existing data protection gaps are closed.

DON'T FORGET ABOUT PHYSICAL DATA

GDPR requires appropriate measures to protect personal data, including what appears on physical documents. Identifying areas of the office that could pose a threat to physical data



security is the first step toward creating a secure environment that is less susceptible to breach or theft.

The most vulnerable physical information is often found in unassuming places, from printers to messy desks to old storage bins to employee trash cans — and these access points are typically scattered and left unattended throughout the office. GDPR regulations determine how long to store documents, making the retention and accumulation of outdated documents riskier. Law firms must keep track of what sensitive materials they are storing and how they’re stored through a document management process, which will help employees determine the appropriate lifespan.

Ultimately, widespread damage resulting from noncompliant behavior can make or break a business. Beyond the associated costs — organizations that do not maintain GDPR compliance can face fines up to 4 percent of their global turnover — businesses that do not adhere will inevitably compromise their reputation, current and prospective clients, employees and revenue. They may even face legal consequences. Developing an environment that prioritizes data security is key to mitigating risk and ensuring that employees are equipped with the knowledge to maintain compliance, especially amid times of change. ■

ABOUT THE AUTHOR



Ann Nickolas is Vice President of Shred-it, where she oversees new business development and account management for customers in the commercial, health care and government verticals. Nickolas helps businesses secure their confidential information with products, services, policies and training that help protect them from the risks, fines, penalties and loss of revenue that come with an information breach.

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Bringing Effortless, Painless Transactions to Law

By Alan S. Fanger, Esq.



In our technology-driven world, the effortlessness of the customer experience has become the barometer against which the quality of innovation is measured. We're frenetic, stressed and seem to have our collective attention pulled in all sorts of directions, so reducing the time and effort it takes to engage in mundane transactions relieves us of a thousand little burdens.

THE IDEAL TRANSACTION SCENARIO

Now, taking a cue from Amazon's customer-centric philosophy, imagine the following scenario. You are a client of ABC law firm, having signed a written fee agreement via DocuSign or some other comparable software. You upload documents for your attorney's review to a cloud-based portal, in which all documents related to the matter are available 24/7. The matter's critical court dates and filing deadlines are immediately accessible to you electronically — or perhaps even automatically texted to you as they get closer.

After your attorney attends a hearing, they summarize the events in the cloud; notice of a new entry is texted to you. While the case is pending, you follow its progress on a virtual docket that contains the case filings, orders, deadlines and pending dates for hearings and conferences. As attorneys and paralegals work on your matter and record contemporaneous entries of their time and activity, those entries are available to you in real time rather than on the next month's bill. When the bill is due, you use a secure portal on the firm's website to pay.

The firm has an e-learning portal that helps you acquire a basic understanding of the procedures applicable to your matter. If you happen to be intellectually curious, materials in the firm's law library that may be pertinent to your matter are made available for you to access electronically.

At the matter's conclusion, you receive an electronic survey from the firm that asks you to rate its performance. (Those who complete the survey, by the way, receive a gift card for a local restaurant.) You give the firm five stars in all categories.

HOW TO LOWER THE BARRIERS

The impetus to create "transactional effortlessness" is actually greater in the legal profession than in it is for someone buying an iPad on Amazon. More than often than not, a client's initial contact with a lawyer is triggered by stressful circumstances. When a client walks into a firm weighed down by angst, they should be able to take comfort in knowing that the manner and means of their interaction with firm personnel won't add to their stress level.

So how does a firm implement transactional effortlessness? It starts with securing feedback from clients at the conclusion of each matter. A series of survey questions should be included to capture the client's opinion of the interactive experience. Some sample questions include:

- Did you find it easy to use the firm's electronic resources to keep apprised of the status of your matter?

When a client walks into a firm weighed down by angst, they should be able to take comfort in knowing that the manner and means of their interaction with firm personnel won't add to their stress level.

- Were you consistently made aware of the documents that you needed to provide to firm personnel?
- Did you find it convenient to pay the firm's bills?
- Do you feel that you were consistently updated and/or aware of the amount of time that was devoted to your matter?
- Did the use of firm electronic resources help you stay aware of significant dates or deadlines for your matter?
- Were resources for a deeper understanding of the legal issues pertaining to your matter made available to you?

Once the firm has obtained a large enough sample size from the surveys, it can begin developing the architecture for transactional effortlessness. When it comes to designing a client interface, one size will not fit all. A larger firm with sophisticated business clients will likely want to implement something more elaborate than a small firm with a relatively unsophisticated client base.

Some elements of the infrastructure should be central to all firms, large or small. Billing and payment processes should be electronic; there are any number of vendors that can integrate electronic payment systems into the firm's website. The same can be said for docketing and deadline information.

When it comes to client preparation in the litigation area, clients can truly benefit from online videos that supplement live training for depositions, trials and mediations. Large firms should consider creating in-house video capability that would allow for firm-only webcasts and webinars, as well as enhanced preparation of client witnesses through video recording and feedback using video production software.

Although firms are embracing technology that streamlines their internal operations, relatively little attention has been paid to technology that clients can see and use. As organizations' decision-making is transferred to younger generations — who are ever more demanding that service providers make the client experience as user-friendly as possible — firms that fail to recognize this seismic shift are destined to lose market share. ■

ABOUT THE AUTHOR



Alan S. Fanger, Esq., is President of EmpowerLegal, Inc.



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www.linkedin.com/in/alanfanger

The Road to CLM Certification

Earning your Certified Legal Manager (CLM)[®] designation takes time and dedication, and ALA is here to help. Here are four great tools to get you started:

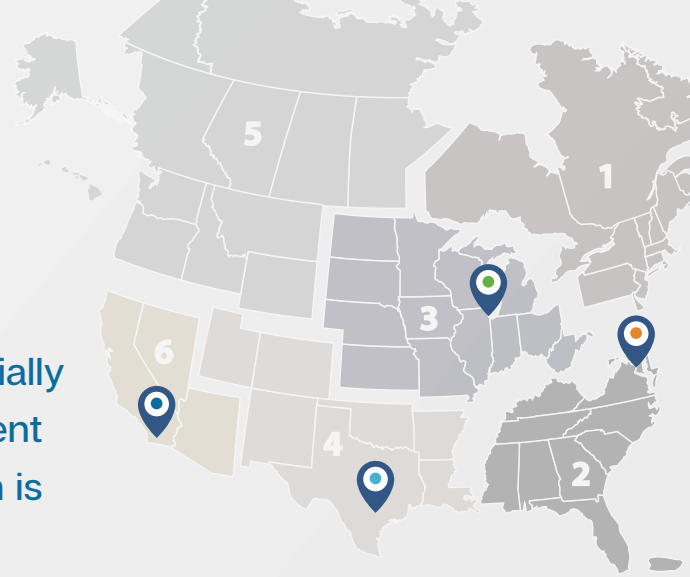
- ✓ *The Study Guide for the CLM Exam: Practice Questions, Preparation and Reviews*
- ✓ The CLM Bundle – an ALA webinar package
- ✓ CLM Study Groups – check your local chapters
- ✓ CLM: A Good Start – a book bundle available in the Legal Management e-Store

Get started at alanet.org/clm





REGISTER TODAY



The Association of Legal Administrators has specially designed its fall events to advance the development of professionals from all walks of law. Registration is open for the following:

SAN DIEGO



Aug. 2-4 Large Firm Principal Administrators Retreat

CHICAGO



Sep. 12-13 Law Firm Management Essentials Certificate Program

Sep. 12-13 Advanced Financial Administration for Legal Management Professionals

Sep. 13-15 Regional Legal Management Conference – **EAST**

WASHINGTON, D.C.



Sep. 26 Legal Lean Sigma® and Project Management White Belt Certification Course

Sep. 27-28 Intellectual Property Conference for Legal Professionals

AUSTIN



Oct. 17-18 Advanced Financial Administration for Legal Management Professionals

Oct. 18-20 Regional Legal Management Conference – **WEST**



alanet.org/events

Anniversaries, Awards and Appointments

MEMBERS ON THE MOVE >>>>



Paula Barnes



Christina Bloom, CLM



James L. Cornell, III



Susie J. Diaz



Sherry Gini



Lori Irons, CLM



John J. Krouzil



Elisabeth Lopez



Sonia McVean



Michael Morales



Megan A. Pluiose



Sharon Smith-Neal

Paula Barnes, member of the Middle Tennessee Chapter, is now Regional Office Administrator for Dickinson Wright, PLLC, in Nashville, Tennessee.

Christina Bloom, CLM, member of the Richmond Chapter, is now Executive Director at Goodman Allen Donnelly in Glen Allen, Virginia.

James L. Cornell, III, ALA President-Elect and a member of the Capital Chapter, is now Office Administrator at Shook Hardy & Bacon, LLP, in Washington, D.C.

Susie J. Diaz, member of the Greater Los Angeles Chapter, is now Office Administrator at Seyfarth Shaw LLP in Los Angeles, California.

Sherry Gini, member of the Greater Chicago Chapter, is now Office Administrator at Baker McKenzie in Chicago, Illinois.

Lori Irons, CLM, member of the Southwest Florida Chapter, is now Chief Operating Officer at Cheffy Passidomo, PA, in Naples, Florida.

John J. Krouzil, member of the Nutmeg Chapter, is now Firm Administrator at Berchem Moses PC in Milford, Connecticut.

Elisabeth Lopez, member of the Alamo Chapter, is now Office Manager at Clark Hill Strasburger, PLC, in San Antonio, Texas.

Heather Mathews (not pictured), member of the New Orleans Chapter, is now Office Administrator at Christovich & Kearney, LLP, in New Orleans, Louisiana.

Sonia McVean, member of the Northern Virginia Chapter, is now Patent Paralegal at Potomac Law Group, PLLC, in Washington, D.C.

Michael Morales, an independent member from Region 6, is now Assistant to the Firm Administrator/Accounting at Bailey Kennedy, LLP, in Las Vegas, Nevada.

Megan A. Pluiose, member of the Boston Chapter, is now Executive Director at Murphy & King, PC, in Boston, Massachusetts.

Sharon Smith-Neal, a member of the New Orleans Chapter, is now Chief Administrative Officer at Irwin Fritchier Urquhart & Moore, LLC, in New Orleans, Louisiana.

Nicole Wallace (not pictured), a member of the Mile High Chapter, is now Director of Finance and Accounting at Taylor & Anderson, LLP in Denver, Colorado.



2018 SUSAN L. FRENCH EMERGING LEADER SCHOLARSHIP RECIPIENTS

Congratulations to our 2018 Susan L. French Emerging Leader Scholarship recipients. These rising leaders in legal management received \$1,000 toward July's Chapter Leadership Institute from the Foundation of the Association of Legal Administrators.

- Audrey Fillion — Downeast Chapter
- Michelle Jephcott, ACP — Knoxville Chapter
- Melissa Kandel — Memphis Chapter
- Seleste King — Tulsa Chapter
- Suzanne Koch — Iowa Chapter
- Leann Miljus — Southwest Florida Chapter
- Amanda Moellendick — Northern Virginia Chapter
- Erica Nunez — New Mexico Chapter
- Rachel Pinney — Houston Chapter
- Ann Thompson, CLM — Orange County Chapter

CONGRATULATIONS TO THE NEWEST CLMS!

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

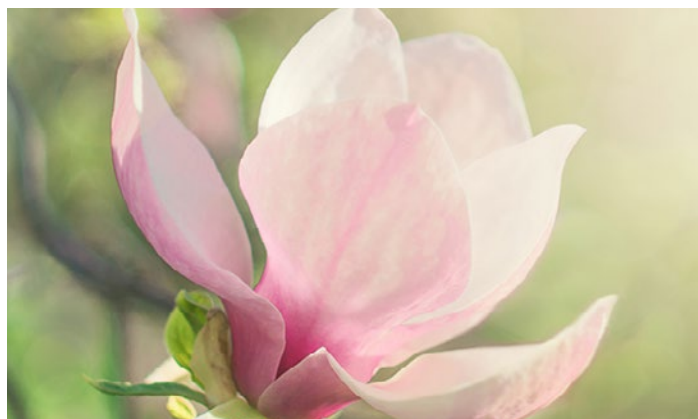
- Susan Armstrong, CLM, Bragalone Conroy PC, Dallas, Texas
- Christopher B. Holmes, CLM, Hackett Feinberg, PC, Boston, Massachusetts
- Barbara Javorcic, CLM, Marshall Gerstein & Borun LLP, Chicago, Illinois
- Olga S. Lee, CLM, SPHR, Tustin, California
- Kim M. McMahon, CLM, Bove & Langa, PC, Boston, Massachusetts
- Suzette Welling, CLM, Taylor & Assoc., Winter Haven, Florida

MEMBERS MAKING NEWS

Earning accolades: The Mile High Chapter was highlighted in the Colorado Bar Association's June newsletter for its new Strategic Relations Committee. "The purpose of this initiative is to form strategic alliances with other Colorado legal associations to tackle shared issues affecting the legal industry's management professionals," said the *Colorado Lawyer*. Check out the article on page 68 of the publication by visiting <https://bit.ly/2ISxfH6>.

OUR DEEPEST CONDOLENCES

Our hearts go out to the family, friends and colleagues of Jacqueline "Jaci" Moline. She passed away in June. A member of the Capital Chapter, she served on the leadership team for several years as the Chair of the Communications & Media Relations Committee. In this capacity, she played an integral role in producing the chapter's monthly newsletter. Jaci worked as the Office Administrator for Carr Maloney, PC, in Washington, D.C. Contributions in her memory can be made to So Others Might Eat (SOME) and the Alzheimer's Foundation of America. The Capital Chapter is planning to donate to both organizations.



ALA's hearts also go out to the family, friends and colleagues of Lisa Kelly, who passed away in July. An ALA member since 2014, Lisa was deeply involved in the Arizona Chapter. She was the President-Elect and served as Diversity & Inclusion Co-Chair, Student Liaison and member of the Education Committee. Lisa also worked as the Attorney Recruiting and HR Administrator at Perkins Coie LLP in Phoenix, Arizona.

Experience Webinars Live and On-Demand

For the best value in online education, look no further than ALA's webinars — dozens of sessions spanning functional specialties and topics for every legal management professional. They're hosted by speakers who come highly recommended, either directly from attendees of ALA conferences or from industry word of mouth.



You can view webinars live, allowing you to participate and ask questions in real time, or at your leisure. Dozens of webinars are scheduled throughout each year, and the on-demand catalog — which goes back to 2013 — is continually updating.



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continuing education!

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alanet.org/webinars

Boston Chapter Makes Big Impact with Local Boys & Girls Club

Valerie A. Danner, Managing Editor, Legal Management



Earlier this year, the Boston Chapter was honored with the Medford Community Partner of the Year award by the Boys & Girls Clubs. The chapter was recognized for their three-year commitment to building a program for at-risk teens.

For the Boston Chapter, finding ways to serve their community has always been paramount to their foundation. So it was unexpected, yet fitting, when they were honored with the Medford Community Partner of the Year award by the Boys & Girls Clubs of Medford and Somerville at their annual Inspiration Celebration earlier this spring.

The award was to recognize the chapter's three-year commitment to building a program for at-risk teens.

"The ALA Boston Chapter has partnered with our Boys & Girls Clubs since 2016, raising more than \$30,000 during that time in support of Teen Programs at our Medford Club," says Lindsay Smythe, Executive Director for the Boys & Girls Club of Medford and Somerville.

It filled a need within the community. "There wasn't a program from the 14- to 18-year-olds, which can be a

vulnerable time in a child's life," says Chris O'Sullivan, CLM, who is Immediate Past President of the Boston Chapter and the Chief Financial Officer with Gesmer Updegrave, LLP. This funding provided programs and resources to these teens, including after-school events and programs, field trips, and counseling, guidance and mentorship that they may not otherwise have access to.

The Boston Chapter fully embraced the program as is evidenced by their fundraising efforts. "We guaranteed them a minimum of \$10,000 a year and exceeded that for two years, raising \$15,000 or more and are on our way to accomplishing that in 2018 as well," says Ginni Klier, who serves as VP Communications and Visibility for the chapter and is the Office Manager with Kotin Crabtree & Strong, LLP.

At the start, there were only a few kids in this age group getting these services. Thanks to the partnership with the Boston Chapter, they now have 20 to 30 teens taking

“Maybe if you can help one kid do something ... to go to college or look at the world differently — it’s worth it.”

advantage of the program. “We wanted to help the kids as they grow up,” says Chris. “Maybe if you can help one kid do something ... to go to college or look at the world differently — it’s worth it.” It’s also allowed them to expose teens to the possibilities of careers in legal management. And because of the donations, they were able to serve more teens and offer more programs.

“Thanks to ALA workplace fundraisers, golf tournaments, social events and more, Medford Club teen membership has tripled, the Club added a second high school teen night weekly, leadership development opportunities for our teens have greatly expanded, and our teens are reaching more Academic Success goals, including college visits and prep,” says Smythe. “The very generous ALA Boston network of chapter members and business partners also collects new warm hats, gloves, and scarves every year for us to share with our Club members who need them. In short, ALA Boston Chapter support has been even more transformative than we had even hoped, earning them the title of our 2017 Community Partners of the Year.”

The students have felt the impact, too. Smythe regularly shares letters of thanks from the teens who have benefitted from the program.

Another key to the program’s success is that the Boston Chapter is selective when it comes to picking organizations to work with. The leadership made a pointed effort to really focus their charity efforts. They know members are stretched thin with time, so they strive to find organizations that everyone can get behind.

“We do a lot of vetting of charities, and we have certain criteria they have to meet,” says Ginni. “We needed something that the chapter can get behind — everybody knows somebody who attended the Boys & Girls Club.”

Chris says the Boys & Girls Club fit that perfectly and it wasn’t a hard sell for members. He notes that even when members came to town for last fall’s Eastern Regional Conference in Boston, they also donated to the programs.

That collective effort is what makes the award even more meaningful. “What struck me as interesting is that most of the people who win the award are businesses in the community. But this is a nonprofit funding another nonprofit winning the award,” says Chris. “We didn’t start out to win it, but just like with the ALA awards, it shows some accomplishment.”

KNOW A RISING STAR IN LEGAL MANAGEMENT?

We want to meet them! We’re looking for ALA members who take volunteering within their local communities to the next level for future profiles like this one in *Legal Management*. Email publications@alanelt.org for more details.



2017 Susan French Scholarship Recipients Reflect a Year Later

Each year, the Foundation of the Association of Legal Administrators awards scholarships to emerging leaders so they can attend the Chapter Leadership Institute (CLI). This fund was established by GLJ Benefit Consultants in memory of former ALA President Susan L. French in recognition of Susan's commitment to professionalism, dedication to the advancement of law firm administration, development of future leaders and record of long-term service to ALA. Recipients receive funds to assist them with developing their leadership skills through CLI. This annual event is geared toward burgeoning leaders within the ALA community.

In 2017, seven members received scholarships to attend CLI in Minneapolis. Several reflected on how the experienced has helped them become better leaders this last year.

There were two things I attained: To not just focus on the Millennial generation, but the next generation — all generations have their own way of working. [I also learned how to] find ways to engage your chapter members through various technology avenues.

Keri Frerk, Director of Finance
Dickinson Mackaman Tyler & Hagen, PC
Des Moines, Iowa

Since attending CLI in 2017, I transitioned to the role of President of our chapter. I am committed to a two-year term and have identified our next president-elect. In an effort to bring more value to our members, my first project was to create and circulate a (local) chapter needs survey. We will review the results for use when planning activities for the coming year. Thanks to my attendance at CLI I had the opportunity to meet and cultivate a relationship with ALA business partner Alan Wilson of GLJ Benefit Consultants. Since then, Alan has traveled to Idaho to promote ALA and its benefits to our members and has recently committed to sponsorship of the Idaho Chapter.

I'm carrying the torch for a project started by my predecessor, Stacey Coleman, in finalizing launch of the Idaho Chapter website. Next steps: find ways to attract sponsors/business partners and deliver ROI, drive members to our site, promote ALA local/national activities and events and ultimately, increase membership.

I plan to present at a membership meeting of Idaho Women Lawyers in alignment with ALA's diversity and inclusion initiatives; utilizing ALA resources to promote the benefits of membership to key stakeholders.

Tammie L. Gonzalez, Office Administrator
Stoel Rives LLP
Boise, Idaho

The ability to pick other people's brains for certain situations is invaluable — it's the most value ALA offers outside of education. I also attended a session on membership retention that was quite brilliant and brought back those ideas to my chapter. If you attend, don't sit in the back. If you get there and the session looks full, don't let that deter you — it's a sign of a good session!

I especially enjoyed the lunch where everyone sits at a table with an assigned topic to discuss. I sat at the CLM table and I made a number of contacts that were engrossed in study for the CLM exam, too. It was easy to reach out to them for support.

Attending CLI and being a part of ALA is the difference between being a member and being a part of it — being a part gets you so much more than just being a member. Having those contacts nationwide for networking and friendships is invaluable. Participate if you can.

Monique Mahler, Human Resources Manager
Baker Hostetler LLP
Houston, Texas

Since receiving the Susan French Emerging Leader Scholarship to attend CLI in 2017, I have become the President of the Hawaii Chapter of the ALA. This is a role that I might not have considered several years ago. However, with the support and encouragement of our members and past leaders, I decided to make the leap.

Attending CLI was extremely helpful in preparing for this position, not just because of the great educational opportunities available there, but also because it gave me a chance to meet other aspiring chapter leaders and incumbents. They helped me to feel confident that I had the support of a community much larger than my chapter alone. (This is important when you are on a little island far away in the Pacific Ocean.) It is very reassuring to know that there are others that are walking the same path, struggling with the same obstacles, and working towards similar solutions.

In short, CLI provided specific tools that I could immediately bring back to my chapter, and it was also a morale and confidence booster that I needed to feel "worthy" of the title of Chapter President. In the end, I do feel that everything is a group effort and these titles, to some extent, are just that — titles. But they are still necessary and through CLI I have come to better understand how we can all work and learn together for the benefit of all, and how I can embrace my part of that process.

Karen M. Senn, Accounting/Office Manager
Anderson Lahne & Fujisaki LLP
Honolulu, Hawaii

I feel like I got a lot out of the CLI conference in 2017. I learned so much from other chapters — especially other small chapters. I came away from the conference with a lot of new ideas that I brought back to Utah. I also had the opportunity to network with other ALA professionals. This resulted in another member nominating me for Regional Representative. I probably never would have applied for this position on my own, but I decided to go for it and now I'm a Region 4 Representative. All of these things have helped me grow professionally and personally.

Paul M. Walker, Controller
Snow Christensen & Martineau
Salt Lake City, Utah

ALA'S LEGAL MANAGEMENT TALK



2018 Podcast Series

ALA's podcast features exclusive interviews with industry thought leaders – *free!*

Hear industry-leading experts — including Annual Conference & Expo speakers — share their best tips in 15 minutes or less! Check out past episodes of ALA's podcast and get ready for more!



An Audio Overview of the 2018 Annual Conference & Expo, narrated by **Kate Raftery**



Business Continuity Plans with **Kathy Scourby**



Information Assets Management with **James Price**



The Climate for Retirement Plan Sponsors with **Norma Sharara**



Funding Office Remodels and Renovations with **Christina Floyd** and **Karen Leastman**



Succession Planning with **Michael Moore**



The Power of Web Video with **Corey Saban**



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Strategic Plan Update: Goal 2 — Increase Member and Business Partner Value



Goal 2 of ALA's Strategic Plan is to increase member and business partner value. In fact, it's what drives what we do every day.

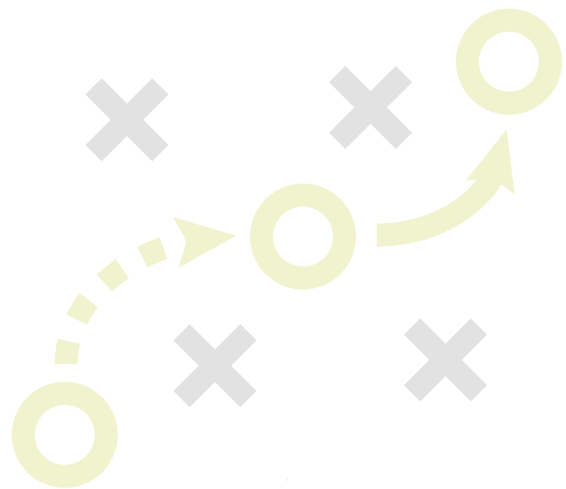
Last month, we introduced a new white paper on the changing role of the legal secretary and later this year, we'll be offering a new job description tool kit that uses the Uniform Process Based Management System (UPBMS) as its foundation. But it's one of our most enduring resources, *Legal Management* magazine, that members value most.

Legal Management consistently ranks as one of the most valuable resources for members and business partners. Ten times a year, we bring you knowledge and insight on the industry's most critical issues and the tools to address them. Last year, we introduced an annual print edition of this award-winning magazine, featuring some of our most popular articles from the past year. We're pleased to announce that this year's print edition includes 20-plus pages

of new content, including a feature on the impacts of the #MeToo movement on HR policies.

As diversity and inclusion continues to be a challenge in the profession, regular *Legal Management* contributor and Diversity and Education Director for the Illinois Supreme Court Commission on Professionalism Michelle Silverthorn provides practical steps your organization can take to create a more welcoming and vibrant work environment. Additionally, we cover advances in artificial intelligence and the changes they are bringing to the delivery of legal services. Other technology innovations — such as blockchain and quantum computing — are transforming the legal landscape, and the print edition will offer insights into what's here and what's coming. Plus, if you're looking for continuing education (CE) credits, we've got you covered there, too! We've printed our CE course from the March digital edition on overseeing trust accounts. Just read the article then take a 10-question exam. You'll earn one hour of CE credit for successfully passing it. Members pay just \$49 to for this benefit.

Look for the print edition of *Legal Management* to hit your mailboxes in in mid-July. We hope you enjoy the content, and that you'll continue to share it with your colleagues. Happy reading! ■



Financial Statement

At ALA, we continue to work to make the most efficient and impactful use of our financial and human resources. ALA's Board of Directors and staff are continuously exploring and identifying opportunities to improve efficiencies and optimize results.

Overall, revenue for 2017 was \$7.63 million (8.65 percent lower than budget), and expenses were \$7.54 million (9.05 percent lower than budget), resulting in a net gain of \$86,349, about \$86,000 more than our November forecast.

As we head into the second half of 2018, we remain focused on elevating your membership experience. We invite you to check out the ALA 2017–2020 Strategic Plan to see the goals we are working to in the next few years. We look forward to working with the entire ALA community — members, business partners, chapters and other leaders in the business of law — to achieve these goals.

ASSOCIATION OF LEGAL ADMINISTRATORS AND AFFILIATE CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

As of December 31	2017	2016
ASSETS		
CURRENT ASSETS		
Cash and Cash Equivalents	\$ 1,168,633	\$ 1,327,729
Receivables, less Allowance for Doubtful Accounts of \$4,000 and \$7,500	13,083	17,866
Investments, at Market, Current	1,748,759	1,289,180
Other Assets (Principally Prepaid Expenses)	461,632	298,069
Prepaid Income Taxes	320	320
Total Current Assets	3,392,427	2,933,164
INVESTMENTS, AT MARKET	224,971	42,657
PROPERTY AND EQUIPMENT, AT COST		
Furniture	324,177	324,177
Computers and Equipment	223,500	294,719
Leasehold Improvements	359,657	359,657
Less Accumulated Depreciation and Amortization	907,334	978,553
	461,001	430,879
	446,333	547,674
INTANGIBLE ASSETS, NET	141,448	203,677
TOTAL ASSETS	\$ 4,205,179	\$ 3,727,172
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Current Portion of Capital Lease Obligation	\$ —	\$ 1,244
Accounts Payable	59,026	64,209
Accrued Expenses	147,350	134,059
Deferred Rent — Current Portion	17,134	10,006
Deferred Revenue	2,423,268	2,045,327
Total Current Liabilities	2,646,778	2,254,845
LONG-TERM LIABILITIES		
Deferred Rent	316,866	336,517
Total Liabilities	2,963,644	2,591,362
UNRESTRICTED NET ASSETS	1,241,535	1,135,810
TOTAL LIABILITIES AND NET ASSETS	\$ 4,205,179	\$ 3,727,172