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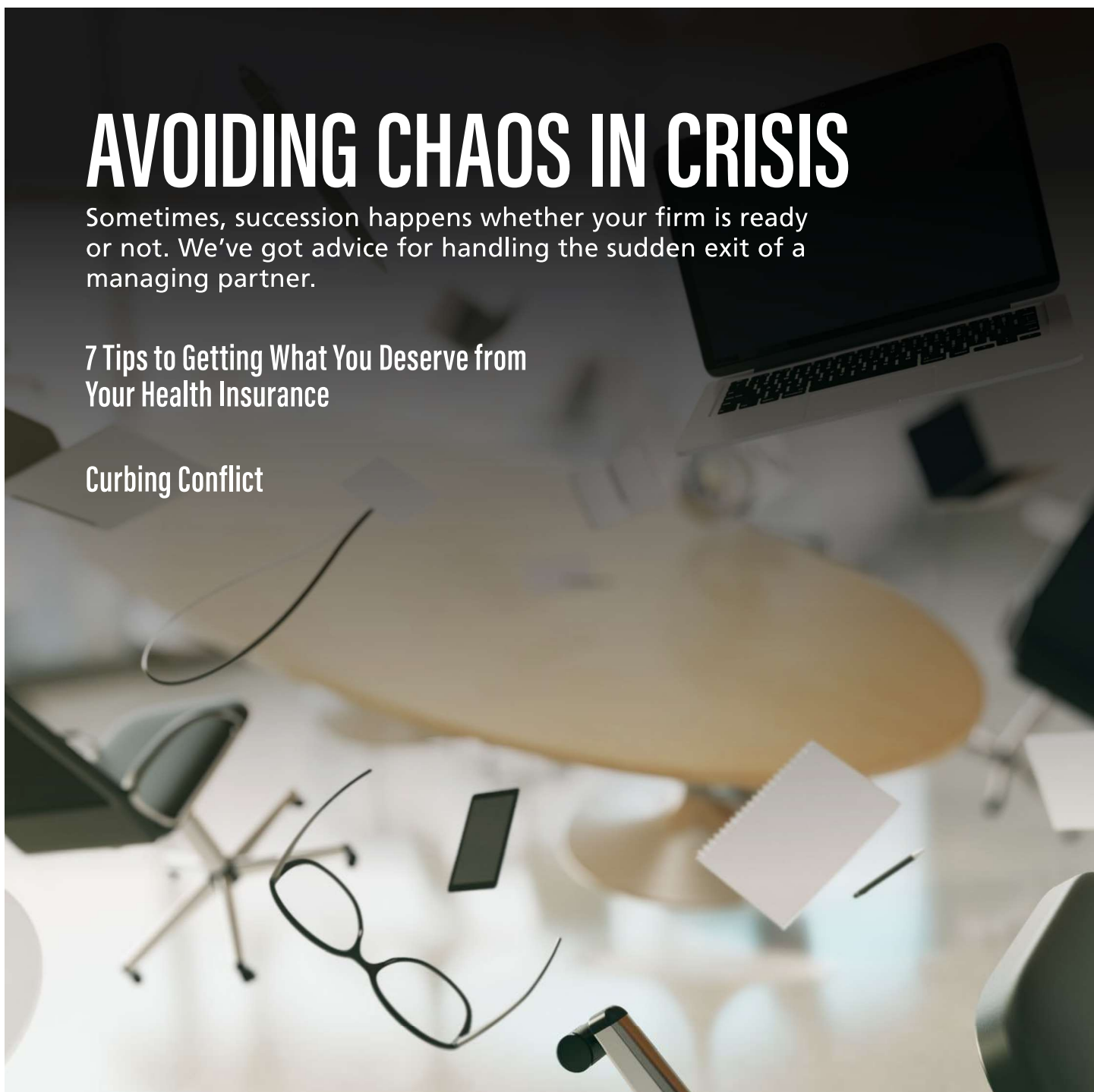
THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

AVOIDING CHAOS IN CRISIS

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OLIVER YANDLE, JD, CAE
*Executive Director, Association
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“

Those firms without clear succession plans for these key roles have found themselves floundering as they try to keep the firm moving and fill the voids left behind.”

The Best Laid Plans

Even before ringing in 2017, my husband Jeff and I knew this would be an incredibly busy summer. We had a family reunion in Montana, a baptism, a wedding, a number of business trips, several houseguests visiting almost every weekend, and my 50th birthday vacation.

Being a planner, Jeff is intent on making sure that every detail is accounted for. For his family reunion in Montana, we would be spending a lot of time driving, so he wanted to make sure that my 86-year-old mom had back support in the rental car. He sent a packing list to my niece to make sure she had the proper shoes for horseback riding. He made sure that every boat, restaurant and tourist attraction had wheelchair ramps. He had his parents do recon on all the events we scheduled to make sure they were OK.

He was no less meticulous about the plans for my birthday trip — all of which was to be a surprise. He'd been working on the itinerary for nearly two years and, amazingly, kept all the details a secret. We were both very excited about our two-week trip.

We were running last-minute errands on the day before we were to depart, when we got the shocking and devastating news that Jeff's mother, Gail, had passed away completely unexpectedly. Everything changed in an instant. All the plans we made — not just for the summer, but for the next few decades — were turned upside down.

Jeff and I had talked a lot about how we could help take care of our parents in their later years. Jeff's parents would come to live with us when it was time for them to downsize. We talked about how to configure the house, whether they would be happy living in the city after years in a small town out west. We were planning for the expected and weren't prepared for what actually happened.

It's caused us to rethink a lot of our plans, looking at every angle to make sure we can protect and provide for each other and the ones we love. So often, it takes a traumatic

event like this to get us to focus on these kinds of issues. But preparing for sudden and unfortunate events makes getting through those difficult periods a bit easier for everyone.

As the Baby Boomer generation continues moving into retirement, we've talked a lot about the importance of succession planning in law firms. Often, those conversations are focused on planned, orderly, predictable transitions. But many firms have experienced the sudden loss of a senior or managing partner, a key firm leader, or other colleagues upon whom effective operations of the firm depend. Those firms without clear succession plans for these key roles have found themselves floundering as they try to keep the firm moving and fill the voids left behind.

This month's cover article, "Avoiding Chaos in Crisis" by Mary Kate Sheridan, provides important insights and critical

recommendations to help your firm prepare for the unexpected. While no amount of planning can account for every potential scenario, no planning will ensure that your firm will be irreparably harmed when crisis strikes.

Jeff got his planning gene from his mom. While she wasn't able to be with us for the family reunion in Montana, I know she is proud of the wonderful trip her son put together for all of us. And that we are even more focused on planning for the future than ever before. ■



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Succession Planning: The People Side of Change

With 10,000 Boomers retiring each day, the changing role of the legal secretary, WATSON and doing more with less, succession planning shouldn't exclusively focus on replacing people. Instead, succession planning should also zero in on preparing people to take on new tasks and responsibilities and capturing individual and institutional knowledge.

Ensuring the right talent and skills are in place to support the client, without missteps in the quality of service, are paramount. A strong individual development plan (IDP) and knowledge management (KM) strategy are essential to growing your people, maintaining an agile workforce and building a reputation for forward thinking.

The recent *CNBC.com* news article, "Lawyers Could Be Replaced by Artificial Intelligence," reminds us of the ever-changing workplace and that, in the world of technology, no role is safe. The same article cites the Deloitte Insight report estimating that "40% of jobs in the legal sector could end up being automated in the long run." Proponents of artificial intelligence (AI) claim the legal sector will flourish by the reduction in costs making services more widely available. That's a wide gap. The question becomes if your firm adopts technology such as WATSON, bots or AI, what will the people side of change look like? More importantly, how can you prepare for it?

Succession planning ensures there is a process in place to get the work done, the transition is smooth and there is little to no disruption in service to your clients. By focusing on the work crucial to the operations and the value it brings to the client — and with an eye on the inevitable changes of personnel, technology and the industry — a firm will be able to develop the people within, to have the skills required to continue.

“

Succession planning ensures there is a process in place to get the work done, the transition is smooth and there is little to no disruption in service to your clients.”

A strong succession plan includes six key phases:

- 1. Strategy**
- 2. Identification**
- 3. Planning**
- 4. Communication**
- 5. Execution**
- 6. Evaluation**

This article focuses on the planning phase, and provides a short synopsis of the steps that come before and after.

PREPLANNING

Before devising any solution, know the firm's needs and its business drivers to ensure that it is solving the right problem. Begin with a review of the firm's overall business strategy. Plan for the current and future needs of the firm by identifying key positions and tasks, researching emerging technologies and trends, and recognizing potential departures due to retirement or changing support ratios. Next, identify the firm's existing talent pool and identify any skill gaps. Know both the skills to be developed, and the people or job roles needing the skills.

PLANNING PHASE

After strategy and identification, comes the planning phase. Planning consists of two parts: individual development plans and knowledge management. An IDP assists employees in their career and personal development. It helps them reach short- and long-term career goals and improve their current job performance.

Developing an IDP is not a one-time activity. It should be referenced and honed regularly, incorporating both the skills needed to excel in the current role and the emerging skills anticipated for the role of tomorrow. Short-sighted plans that only improve the role as it looks today may be deficient. Discuss the importance of having a strong IDP with employees, stressing the benefit to the individual as well as to the firm. Take time to include the firm's long-term strategic vision for what roles may look like in the next 5 to 10 years and the trends that impact legal today and how those trends are expected to impact the work of the future.

In addition to developing strong IDPs, creating a strong KM strategy is critical for succession planning. Retirement trends, departures, mergers and acquisitions, and the potential loss of knowledge and expertise is worrisome. KM concentrates on the processes and methods for capturing and sharing

the institutional knowledge within the firm to ensure there are no gaps. For this information to be captured, organized, secured and made accessible by the authorized people, there must be a systematic strategy for employees to easily record and share their knowledge. A KM plan should be efficient, scalable, replicable and standardized across the firm. Most importantly, it should be simple to adopt.

POST-PLANNING

Once the planning phase has concluded, an effective communication plan prepares employees for transition and communicates the firm's commitment to growth. Next, implement and provide training in advance of changes to mitigate loss of productivity. Finally, monitor the results and reevaluate the overall succession plan annually.

The reality is people leave and the industry shifts. Putting into place a strategic plan that grows your people and captures their knowledge ensures the right talent and skills are in place to build a reputation for success. Change is happening. Don't let your organization limp into the future; make it strong with a solid succession plan that focuses on the people side of change. ■

ABOUT THE AUTHORS

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URI GUTFREUND
National Law Firm Practice Leader
Risk Strategies Company

“

The best health insurance brokers understand their service role in assisting their firm's employees with these problems.”

7 Tips to Getting What You Deserve from Your Health Insurance

Providing excellent health insurance to your employees is the goal of most law firms. The problem today is that even after spending lots of firm (and employee) money, health insurance claims are not always paid properly. This leaves your employees to shoulder hard-dollar costs — not to mention the hours of wasted time fighting with insurance companies.

The best health insurance brokers understand their service role in assisting their firm's employees with these problems.

Here are seven tips from our internal claims fighting champions to get what you deserve from your insurance companies:

- 1. Team up.** Your health insurance broker often has systems and teams already in place to fight for you, so don't assume that they can't help you — just ask. In some circumstances — especially if you are looking for a combination with medical concierge — consider engaging an outside company like Compass or Health Advocate. They can assist in the medical planning (strategy on treatment plans), as well as digging in and reviewing each medical provider's bills until they are fully processed by the insurance company.
- 2. Communicate from the onset.** Many claim problems are a result of your employees not understanding their benefits. A good open enrollment meeting and written communication can alleviate misunderstandings later. On the annual renewal process, spot common misconceptions or challenges and be proactive about those specific issues.
- 3. Avoid the game of telephone.** We often find a breakdown in the claims submission process from the medical providers. A comprehensive review of how the claim was

submitted is often the method to detect incorrect charges. Lately, the biggest errors are coming from the medical provider inputting the wrong Current Procedural Terminology (CPT) code, or incorrectly miscoding preventative as a regular service leading to a much higher employee cost. (CPT is a massive database of all medical procedures to which insurers base their reimbursements.)

- 4. Wait for the dust to settle.** Do not pay the bill! It is critical to wait a minimum of 7 to 10 days from the date of service to allow for the insurance company to process claims. Many times medical offices and hospitals will request from your employees a direct payment (sometimes huge sums) prematurely. In today's climate where some employees have high-deductible plans, medical providers are sometimes requesting thousands of dollars up front at the point of service. If at all possible (even if you have a high-deductible plan), push to allow the insurance company to process the claim before you make any payment.
- 5. Plan for everything.** Call your insurer to ascertain if there are ANY protocols that you must follow BEFORE treatment. Although insurers have shortened the list of procedures that

require precertification, the penalty for not following their procedures — like precertification — are becoming more severe. The good news is that contacting someone from an insurance company “live” — be it over the phone or via live chat — has become easier over the past few years.

- 6. Beware of hidden providers.** Even with your planning, you must be on the lookout for extra charges from hidden providers. With all hospital admissions, there are teams that will provide services during your admission. While you likely know your treating physician, there are many others who work in a hospital environment that are billed by the hospital (paraprofessionals, hospital labs, nurses, etc.). Most of these are billed and covered by the facility. There are other providers (aka hidden providers) that you usually have no choice in selecting, such as the anesthesiologist, that may NOT follow the hospital billing arrangements. These providers will sometimes attempt to bill you at much higher levels than your insurer provides. With enough wrangling, they will usually accept the fees provided from your insurer.
- 7. Add up the paperwork.** On complicated claims like a hospital admission, it is important to make sure that all of the claims have been processed before tackling the problems. It is tempting to deal with each bill/explanation of benefits (EOB) as they arrive; however, it can lead to duplicate or overpayments that are difficult to undo after the fact.

Providing robust health insurance plans can be a very good method for retaining your best employees. The best firms are learning from their claims' history to keep upping their game to minimize claim disruptions and demonstrate their desire to be the employer of choice. ■

ABOUT THE AUTHOR

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



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Facts and Stats

THE IPHONE TURNS 10

June 29 marked 10 years since the iPhone debuted and ushered in the age of the smartphone. Pew Research Center compiled some facts about the devices that have changed the way we interact. Some highlights include:

- 77 percent of U.S. adults own a smartphone, up from just 35 percent in 2011.
- 96 percent of 18- to 29-year-olds live in a household with at least one smartphone.
- 28 percent of U.S. adults use a smartphone as part of their job search — that figure spikes to 53 percent for 18- to 29-year-olds.
- 89 percent of mobile owners report using their phones during their most recent social gathering.



For more facts about the impact of smartphones, read the full survey: www.pewresearch.org/fact-tank/2017/06/28/10-facts-about-smartphones.

HELP SHAPE THE INDUSTRY'S COMPENSATION AND BENEFIT KNOWLEDGE

In ALA's 2016 Compensation and Benefits Survey, we reported that positions related to privacy, cybersecurity and e-discovery were growing. Of the surveyed offices, 3.4 percent reported having an e-discovery director/specialist, 1.7 percent reported having a cybercrime director/specialist, and 1.4 percent reported having a privacy director/specialist.

To see if this trend rises in 2017 — and for the latest related to compensation and benefits issues across the United States — be sure to participate in this year's Compensation and Benefits Survey at alanet.org/education/research/compensation-and-benefits-survey. If you participate, you'll get a discount on the full report when it is available this fall.



CYBERSECURITY SCORECARD SAYS LAW FIRMS UNDERPREPARED

LogicForce, an IT consulting firm, recently released its Law Firm Cybersecurity Scorecard. Despite the FBI's continuous warnings that law firm cyberterrorism is on the rise, the report finds many firms still struggle to put the proper safeguards in place.

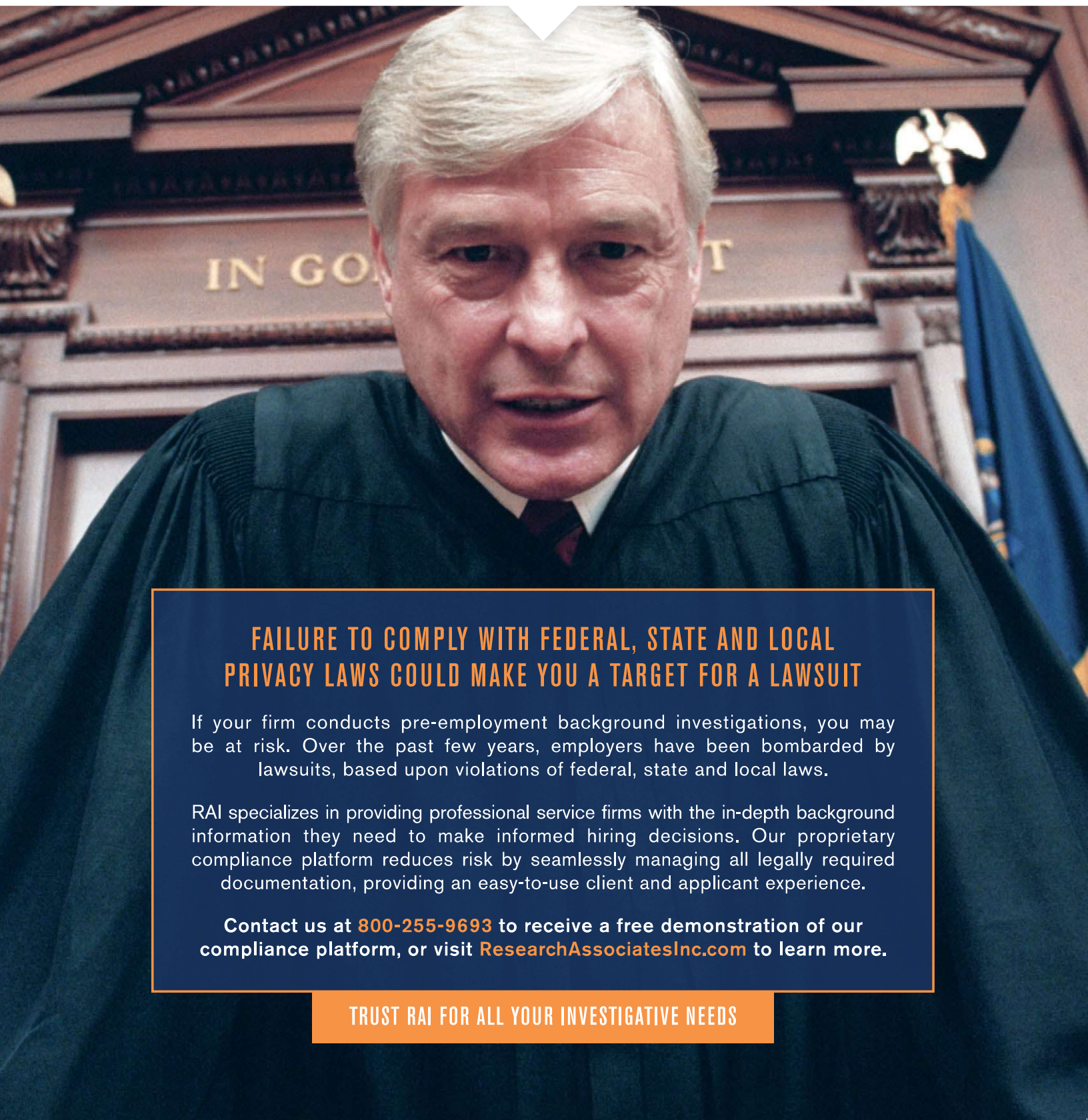
The report is based on survey data and firsthand system reviews of more than 200 law firms. Here are some key findings:

- 100 percent of law firms in the study did not meet their clients' cybersecurity requirements.
- 10 percent of firms lost a client due to failed cybersecurity reviews in 2016.
- 77 percent of firms had no cyber insurance in place.
- 40 percent of the firms had been breached in 2016 without knowing it.

In short, law firms, which store intellectual property, government secrets, and volumes of private data on their servers, remain unprepared for increasingly sophisticated attacks.

The scorecard, which will be issued quarterly, also details steps that firms can take to modernize their cyber operations. Read the full report here: <https://docsend.com/view/eq324yq>.

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Curbing Conflict

Conflict is inevitable in any office. Here's how you can effectively manage it.



KYLIE ORA LOBELL
Freelance Writer

Attorneys are used to fighting for their clients in the courtroom. But sometimes that conflict spills out into the firm, creating a toxic environment that can have a destructive impact on every partner and support staff member.

"Whether a partner is talking down to associates, or paralegals are gossiping about their colleagues, conflict can occur on any level. It is up to everyone at the firm to stop it before it spreads. Otherwise, it may end up hurting the firm's client relationships and bottom line."

COMMON CONFLICTS

"What we've heard from participants about law firms is conflicts arise because trust and communication breaks down," says Rebecca Armacost, Director of the Mediation Training Institute (MTI) at Eckerd College, which provides consulting in workplace conflict mediation and management. "The most common approach is confrontation or avoidance in law firms, and they tend to be used most often by paraprofessionals and lawyers. If someone is more confrontational and another person is likely to avoid, the problem will continue to fester."

In her time at MTI, Armacost has also noticed that law firms have issues because there are a lot of egos involved. "The egos, coercing and bullying is not just common from partners," she says. "Some are from office staff and administrative [employees]. It can happen with two admin professionals. It's based on relationships and personality style."

To stop the abuse before it gets out of hand, meet with that person and say you're not going to tolerate that behavior.

Michael Rynowecer, President and Founder of BTI Consulting Group, has seen firms have differences over, "agreeing on who receives origination credit for new clients, the amount of time required to complete a task, not being responsive to partner requests, and not being responsive to other partner's client requests."

If you are currently experiencing any type of damaging interpersonal behavior at your firm, here are some ways to resolve it so you can get back on track.

DON'T LET PEOPLE GET AWAY WITH IT

Christina Harris Schwinn, Partner at Pavese Law Firm, says that often, an individual who performs well is also a menace. "[He or she] gets away with it if [he or she] is a top earner. The law firm should recognize that you cannot allow your top performers to be abusive to employees or anybody else."

To stop the abuse before it gets out of hand, Schwinn says suggests meeting with that person and saying you're not going to tolerate that behavior.

Once you recognize that interactions at your firm are unhealthy and people are not treating each other with respect, you can use a few strategies to reverse it.

USE MEDIATION TACTICS

If it's you and a colleague having issues, Rynowecer suggests handling it directly. "The best way to handle conflict is to resolve it directly with the person with whom you have conflict," says Rynowecer. "This often requires a person to remove their emotions and listen to what others are saying whether you agree or not. The goal is to find the underlying cause so you can resolve the conflict."

If you are dealing with one-on-one conflict on your own or you bring in a mediation consultant, you can utilize mediation tactics to ensure everyone is being heard. Armacost recommends engaging with the person with whom you're in conflict, and not to walk away.

"Don't try to bully or coerce the person into taking your position, and don't do a power play," she says. "Try to take the first step in solving the problem. You can make an apology, even if it's only to say you did not intend to have the negative impact you did. That can go a long way. Don't exploit the other person's risk taking. If they say they are sorry, don't exploit it," Armacost adds.

ADDRESS THE SIGNS OF TOXICITY

A toxic environment is subjective based on every law firm. "[Generally,] most people agree toxicity arises when negative talk creeps into regular and ongoing conversations, when people are dismissive of each other, and when there are no nonwork related conversations between colleagues," says Rynowecer.

Once you recognize that interactions at your firm are unhealthy and people are not treating each other with respect, you can use a few strategies to reverse it.

"You have to create a culture where people feel comfortable coming forward and saying, 'That's not OK, and I will not be treated like that,'" says Schwinn. "You create it by investing



"The most common approach is confrontation or avoidance in law firms, and they tend to be used most often by paraprofessionals and lawyers. If someone is more confrontational and another person is likely to avoid, the problem will continue to fester."

time in your employees, having meetings with them, and doing things that foster getting along with one another."

Modification starts at the top, according to Rynowecer. "Changes in behavior by leadership is one of the few ways to change toxic behavior. This models nontoxic behavior and the rest of the firm will follow suit. In addition, leadership can coach toxic people to eliminate these behaviors or part ways if these toxic people are damaging the workforce."

Beyond displaying the behavior you want your employees to have, you can also do team-building exercises to turn things around. "[Exercises] cannot be centered around fun activities that ignore the 2,000-pound elephant in the room," says Armacost. "An effective one needs to focus on resolving conflicts by understanding each person better."

To do this, you can use a Conflict Dynamics Profile to assess how each person acts toward conflict. Armacost says it would teach employees how to respond constructively to conflict, how to adapt their own stances, and how to talk openly and honestly about behaviors that are constructive and destructive.

WHO SHOULD HANDLE CONFLICT?

Employees need to be able to solve conflicts on their own before they reach human resources or partners. Otherwise,

Armacost says, they would squander influence over the decision that is reached. "It'll be a lose-lose situation rather than a compromise or something where they both got a little of what they wanted."

If the issue does reach the top of the firm, Rynowecer says mediation and giving power to the people involved is effective. "Management is best suited to handle conflicts because they have the authority to act. The best managers will have the people involved resolve the conflict between themselves or bring in a neutral party to mediate as they counsel each person to listen and accept the other." ■

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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Avoiding Chaos in Crisis

Sometimes, succession happens whether your firm is ready or not. We've got advice for handling the sudden exit of a managing partner.



MARY KATE SHERIDAN
Writer, Editor and Attorney

Solid leadership is critical to a law firm's success. Ensuring that strong management continues in times of transition is equally important. It is no surprise, therefore, that succession is a major consideration within law firms today. In fact, more than half of respondents to Altman Weil's 2016 Law Firms in Transition survey were moderately to highly concerned about Baby Boomer succession.

Despite the importance of succession planning, many firms are ill-prepared, lacking adequate strategies to replace those partners at the top. According to The 2015 National Legal Sector Benchmark Survey released by Cushman & Wakefield and ALM Legal Intelligence, only 15 percent of respondents had a "formal, closely coordinated" succession plan.

This lack of planning becomes particularly problematic in the face of crisis, such as death or incapacitation of a managing partner. In these situations, firm ownership and administrators must work together to keep the firm on track or find the appropriate new direction for the firm.

"There is probably no greater instance of a crisis that I can think of for a law firm than the incapacity or death of the leader of the firm," says Andrew Jillson, Director of Hayse LLC. "There is going to be a large leadership vacuum and the opportunity for the administrator to really make a difference can never be greater than in that kind of situation."

In these situations, firm ownership and administrators must work together to keep the firm on track or find the appropriate new direction for the firm.

This article will discuss strategies for handling a succession crisis when a law firm lacks a formal succession plan, including leadership selection, client relations, internal morale and transparent communication.

1. APPOINT CRISIS LEADERSHIP

Selecting a new managing partner is a rigorous, time-consuming process. When a managing partner suddenly dies or becomes incapacitated (or unexpectedly leaves for another reason), the firm may need a leader to focus specifically on the crisis before it can appoint a long-term managing partner. Thus, firms may select an interim leader or leaders until the next managing partner is chosen.

"I think that unless the succeeding leader is planned well in advance and is an obvious choice — a person has all the segments of the firm in support of them — an interim leader is a good idea in an emergency situation," says Phyllis Weiss Haserot, President and Founder of Practice Development Counsel.

Firm ownership needs to immediately take steps to preserve the firm, and key to that process is choosing the best person or group of people to lead the firm through the crisis, says Jillson. "There needs to be some consensus reached on who is going to step forward," he says. "That requires a lot of dialogue and a lot of communication."

Notably, this leader need not be a candidate for the managing partner position. A firm should seek an interim leader with the skills to deal with a crisis.

"There may be a person within the firm who is fairly suited for dealing with the short-term crisis, but has no interest in being the long-term managing partner," says Jillson.

Of course, a firm may not have a partner who is experienced in handling a crisis, in which case it may consider hiring a consultant or one of the firm's retired attorneys to assist the interim leader, says Jillson.

Even if a partner is equipped to handle an emergency, he or she will still need to learn the ins and outs of running

the firm, which may require a lot of handholding by firm administrators, says Haserot, who emphasizes the importance of transparency in this process.

Once interim leadership is selected, Haserot advises firms to ensure there are no conflicts and to determine any compensation changes for the new leader or leaders. Then the firm should assess exactly what the interim leadership knows and needs to be brought up to speed on, as well as what kind of support is needed to navigate the role effectively, she says.

2. SELECT A LONG-TERM LEADER

With interim leadership in place, firm ownership can then focus on the process of selecting a new managing partner. This process may be outlined in the firm bylaws; if not, the firm must determine the parameters of its selection process. For non-sole-ownership firms, the partners must work together to reach a consensus on who the new managing partner will be.

"But it can't be purely a popularity contest," says Eric Seeger, Principal at Altman Weil. "It is important to be clear on what is wanted and needed from the next managing partner and to select the person who is most capable of carrying that out. Often a respected group of partners will nominate one or more candidates to be approved by the partnership, based on a thoughtful job description, the merits of each candidate and the needs of the firm."

Firm ownership needs to immediately take steps to preserve the firm, and key to that process is choosing the best person or group of people to lead the firm through the crisis.

When the sole owner of a firm dies or becomes incapacitated, firm administrators and lawyers face a more complicated predicament. There may not be another attorney who can manage the client matters

If a firm has lost its top leader, clients may be nervous about the firm's stability and future. Communication with clients during an emergency is critical.

and protect the clients' interests until the next steps for the firm are determined. In these circumstances, those within the firm should cooperate with the state bar's applicable caretaker rules.

3. PRIORITIZE CLIENTS

As a firm develops a crisis succession plan, maintaining client relationships should be a priority. "From the client's perspective, continuity of excellent service is paramount," says Seeger. "From a law firm's position, client retention is paramount."

If a firm has lost its top leader, clients may be nervous about the firm's stability and future. Communication with clients during an emergency is critical, and a firm should be candid in terms of its ability and capacity to handle the clients' matters going forward.

"In any transition, ultimately the client decides if the transition has been successful," says Seeger. "That's why I strongly suggest that firms give full, honest disclosure to the client as to their capabilities so as not to over promise and threaten the entire relationship."

These client communications should be personal, taking place face-to-face or at least via telephone, says Dr. John W. Olmstead, President of Olmstead & Associates and author of *The Lawyer's Guide to Succession Planning: A Project Management Approach for Successful Law Firm Transitions and Exits*.

The firm also should be expedient in its communications. Ideally, the firm should inform clients about a managing partner's death or incapacity before the information is public knowledge, says Jillson. But if the firm cannot communicate immediately it should do so as quickly as possible, as clients will grow concerned, he says.

Firms should take extra care when communicating with direct clients of the deceased or incapacitated attorney. Haserot recommends meeting with these clients in person and looping in partners and senior associates who have been working on the clients' matters. She also recommends

interviewing these clients to determine the clients' preferences and any areas the client would like improved.

4. KEEP ATTORNEYS AND STAFF INFORMED

Just as a firm must be communicative with its clients, it also must be forthcoming with its attorneys and staff.

"Communication is No. 1 in order to instill confidence and stability and inspiration, especially in an emergency," says Haserot. "The administrator has a critical role there in keeping everything from falling apart and monitoring the process."

How the firm handles a crisis situation will affect morale within the firm and could shape attorneys' views of their futures at the firm. It is imperative that firms open a dialogue with associates so that they feel comfortable.

"The younger attorneys are keeping tabs on what firm management is doing and what that means to their own future prospects," says Haserot. "So junior partners and senior associates will be looking at a crisis-succession situation for the messaging it may deliver as to their generation's prospects in the firm. They're looking for stability and opportunity. And this kind of situation will communicate to them whether opportunities are available and whether the senior decision-makers are making long-term or short-term decisions."

5. BE PROMPT AND TRANSPARENT

A major aspect of crisis management is communication. As firms develop their messaging, they should strive to be as transparent and swift as possible. Releasing quick, clear messaging allows the firm to shape its messaging before anyone else reveals the news first.

The firm "should be as transparent as possible, says Haserot. "You have to quickly get the word out or it's going to leak out, and the firm will look like it's hiding something."

This advice holds true, even if a firm is reeling as a result of the succession crisis.

How the firm handles a crisis situation will affect morale within the firm and could shape attorneys' views of their futures at the firm.

"You must lay out specifics and say that even though the situation appears dire, there are things we are doing to save the ship," says Olmstead, who suggests disclosing some of the options the firm is considering, such as selling or merging.

6. BE ORGANIZED

One of the most important things a legal management professional can do in a succession emergency is to be organized and determine what tasks need to be done in response to the crisis. Olmstead suggests that administrators create a checklist of the duties they need to complete, which can be a first step toward structure when the firm lacks a formal succession strategy.

When devising a crisis succession plan, it is also important to organize information on the deceased or incapacitated partner's business. For example, administrators or firm

attorneys may create lists of the partner's client matters and lists of other attorneys in the firm who worked on the matter with the deceased or incapacitated partner, says Olmstead.

7. PLAN FOR THE FUTURE

Once a firm has dealt with a succession crisis, it should not merely move on and forget about succession. Instead, it should use the crisis as an impetus to institute continuous succession planning.

"You have to start planning for all of the other successions that could disrupt and not just say 'OK, that's over with' and go back to ignoring the fact that all of those things could happen," says Haserot.

Firms should start grooming the next generation of leadership so they are ready and have the requisite knowledge needed for a seamless transition, says Haserot. Through this process, firms should also focus on firm morale to ensure that future leaders are happy and plan to stay long-term, she says.

The sudden exit of a managing partner can be a tremendous setback for a law firm that lacks a formal succession plan. The critical steps in this situation are selecting new leadership — both short-term and long-term — communicating with clients, and creating a dialogue within the firm. By staying calm and organized, firm ownership and legal management professionals can tackle the crisis and lead the firm in the best direction. ■

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The Prescription for the Best Practice Group Manager

The attributes some firms are looking for may not be what you expect.
(Hint: It isn't who has the most business.)



ERIN BRERETON

Owner, Chicago Journalist Media

For many firms, the hard skills — relevant years of experience, for example, or written communication expertise — the practice group leader position requirements often seem fairly obvious.

However, the more approach-based capabilities that can predict an attorney's chance of success in the role — such as an aptitude for garnering support — can sometimes be a little less clear.

"Mostly, practice group managers are corralling law firm partners, so they have to have the ability to enlist others and ensure the group moves along with the firm's strategy," says Natasha Innocenti, a Partner at search firm MLegal Consulting. "They need to be constantly problem solving and thinking about ways to improve the partnership."

The ability to promote and sell change was one of the key traits Texas-based law firm Kane Russell Coleman Logan PC, which has just under 100 attorneys, focused on when it switched

“Don’t assume people are good leaders just because they have a large practice. The most important thing is finding the people who want to be leaders and giving them the tools to help get them where they want to be.”

from a siloed to a practice group-based structure roughly 18 months ago, according to Jeff Novel, Director and Financial Services Practice Group Leader.

The task group the firm created to identify possible group leaders examined criteria, such as candidates’ current role; it also determined, Novel says, that each leader would need to have a bit of gravitas.

“One of the challenges we had was would one of the 65-year-old partners listen to what a 35- or 40-year-old wants to implement?” he says. “Some of our lawyers have a very rigid view of how things should be done. We needed people who could break down the walls and say, ‘This is a new structure; here’s how we’re doing it.’”

FINDING A PERFECT FIT

Without factoring in verbal, conflict resolution and other soft skills, firms risk accidentally overlooking valid practice group head candidates.

Without factoring in verbal, conflict resolution and other soft skills, firms risk accidentally overlooking valid practice group head candidates.

To avoid missing out on potentially competent group leaders — or misidentifying the wrong attorneys as candidates — in addition to more traditional factors like seniority, some firms also consider additional qualities, such as:

- **Getting satisfaction from seeing others succeed.** Practice group leaders should either provide personal instruction or facilitate help from another source, such as pairing a group rainmaker with a member who doesn’t excel in that area, according to legal industry Consultant Patrick McKenna, who offers a practice group leader workshop.

“Some people’s concept of the role is totally passive — watch what I do, and you, too, may one day be successful; there’s no action of working to help group members,”



McKenna says. “Critical objective No. 1 is to invest time to really get to know the individual members of the team and their strengths and career aspirations, and coaching and helping each member [to improve].”

- **Being a good listener.** The trait can help practice group managers who are trying to encourage firm members to buy in to proposed changes. “Being someone who can help make people feel like they have a voice, so they don’t feel like it’s a hijack situation, is a skill that can make someone really successful in the role,” Innocenti says.
- **A willingness to help vet clients.** “Client intake, for us, is huge,” says Mitchell Roth, Managing Partner at business law firm Much Shelist, which has more than 80 attorneys. “Make sure you have the expertise to handle it. Before, each lawyer was able to bring in clients; now, there are a lot of factors we look at to see if it makes sense for us and the client.”
- **Promotional skills.** Another important practice group manager objective, according to McKenna, should be to work with the team to identify and implement projects that will help enhance its visibility.

"A really good firm chair or managing partner is making leadership decisions not just for the leader they need at the moment, but using those appointments to develop leaders who can fill other positions down the line."

"[Practice group leaders should aim to] improve service delivery and value to clients, and work toward developing a dominant position in some niche areas of the marketplace," he says.

- **Talent management and recruitment abilities.** Much Shelist practice chairs have more freedom to hire at the associate level than in the past. "Each firm has its own culture, and each group has its own," Roth says. "Each group knows its needs and budget; they're in the best position to interview someone."

SETTING LEADERS UP TO EXCEL

According to Roth, practice group leaders need to first and foremost be good lawyers who are respected by their peers and clients. However, when considering potential candidates, a number of industry members, including Roth, suggest you shouldn't primarily base your decision on the attorney's book of business.

"Some organizations make the mistake of choosing the best salesman; that's often the absolutely wrong person," Roth says. "Don't assume people are good leaders just because they have a large practice. The most important thing is finding the people who want to be leaders and giving them the tools to help get them where they want to be."

To help prepare attorneys for the practice group manager position, Innocenti says some firms are offering educational programs, such as boot camps to teach young partners about law firm financials and public speaking.

"Firms are much more mindful of developing people into the role so they can do more," she says. "A really good firm chair or managing partner is making leadership decisions — not just for the leader they need at the moment — but using those appointments to develop leaders who can fill other positions down the line."

If, for example, your firm wants to eventually add more women to its executive committee, putting female firm members in leadership positions now can help you determine, over time, which might have the best skill set to function in that capacity.

"Having been a successful practice group leader helps position an attorney to be more effective in other roles," Innocenti says. "There's a ladder of leadership the firm should really be cultivating. You don't just find leaders; you make them."

Being a practice group manager, according to Roth, can easily serve as a stepping stone to other opportunities; in the past, Much Shelist's practice group leader responsibilities focused on making sure work was delegated appropriately.

"Some of our lawyers have a very rigid view of how things should be done. We needed people who could break down the walls and say, 'This is a new structure; here's how we're doing it.'"

Today, the firm views the role differently.

"We look at them more as running a small business unit," Roth says. "Find the right people who want to help the group get better — someone with a we, not me mentality. If you utilize the position properly, the culture will be better within groups, and the entire enterprise will be more successful." ■

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Erin Brereton is a legal industry marketing consultant and freelance journalist who has written about the legal industry, finance, business and other topics for more than 50 legal associations, magazines, websites and other publications.



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JOBST ELSTER
*Head of Content & Legal Market
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A true cloud-first reality is more likely if firms are willing to accept compromises as it relates to delivery.”

Heading into the Cloud? Embrace Compromise

In my last column, we talked about legal’s move to cloud-first and the business case for using cloud services in support of firms’ transformation to more agile, innovative business models. As legal IT and firm leadership move in this direction, one thing is clear: The road ahead is bumpy, often uncharted and full of compromise.

From a strategic technology perspective, most forward-thinking firms operate on the notion that the days of custom, roll-out-your-own general services is ending. It may take some firms 20 years to get there, but it is clearly the future for IT in law firms. The move to the cloud is key to this future, because the power of one — meaning all clients run and operate the same cloud version of a given application — only works if there is compromise and a willingness to negotiate.

Based on discussions with several large firm chief information officers (CIO), upward of 95 percent of core IT services and application requirements are similar from firm-to-firm. So do firms really need to come up with their own ways of providing these services? Are we really that different that our way of doing things requires everything to be “our way?” Standards and simplicity in one area can result in standards, simplicity and less cost in another. In addition, reliance on reputable technology vendors and partners is equally a critical ingredient to success — as is the willingness to compromise.

I recently spoke with Mark Garnish, CIO for global legal IT supplier Tikit. He’s a firm believer in compromise when it comes to legal cloud adoption and, specifically, the attainment of 100 percent cloud/cloud-first. He comments that at the moment, specific vendors largely dictate which features/functions are supported in the cloud. As a result, firms must decide between maximizing functionality by minimizing the number of platforms on which a specific application will operate versus looking at the lowest common functional denominator that will enable them to maximize the number of platforms they can support. As a specific example,

Microsoft Word for Office 365 supports different functionality on the desktop, online and on a tablet. Therefore, if you want to work on a document on all three devices, you are limited by the functionality available across all these platforms.

COMPROMISE BRINGS EFFICIENCY

Garnish suggests that firm CIOs who tell you with a 100 percent certainty how to execute their technology strategy will be challenged to adopt a true cloud-first strategy in the short term. He notes that the technology does not necessarily exist to deliver all of the firm's "I wants" or "must haves."

Alternatively, a true cloud-first reality is more likely if firms are willing to accept compromises as it relates to delivery. The popular mantra of "making technology work for you and your way of working" is being replaced with "be flexible when it comes to your existing way of doing things." Firms who are open to bending their processes to what technology allows them to do — rather than forcing technology around what they want to do — are in a good position to pursue a cloud-first vision. This is often a tough sell, since traditional on-premise, client/server systems allow firms to customize applications and processes to their heart's content. But that comes at the cost of future innovation and technology advancements as the custom solutions are extremely difficult to integrate within a cloud setting.

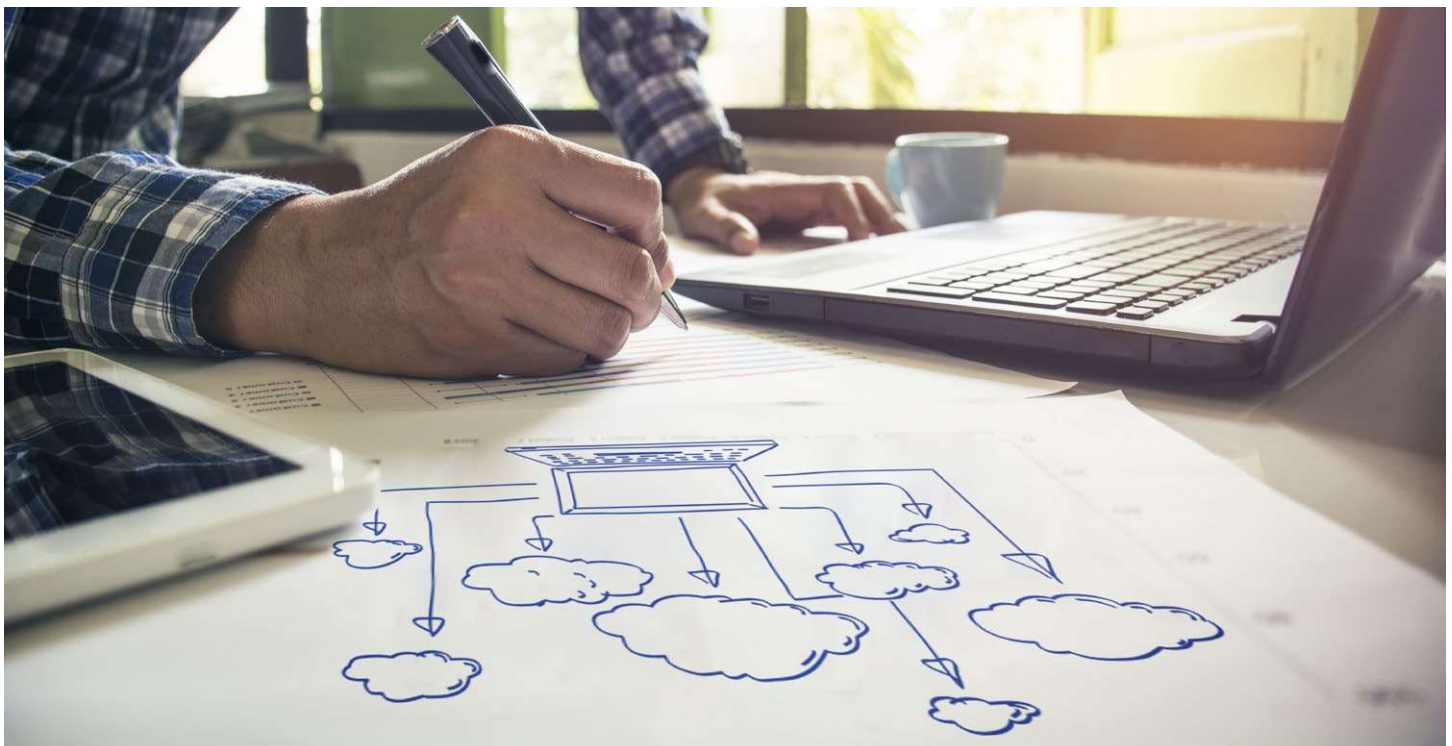
Again, it goes back to "we are in this together" and the willingness to compromise. Cloud is a completely new infrastructure, which goes far beyond hosting off-site servers. It comes with changes in working practices, thought processes and new best practices. Microsoft Office 365 is a prime example of a cloud nirvana with a less utopian reality — at least until firms have a better understanding of their broader strategic IT vision and where they are willing to compromise in the short-term for a long-term cloud advantage. Consider compromise the cost of agility. ■

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While we intended to purchase and test drive the new Surface Pro, we were distracted and taken by the Pro's new flashy cousin, the Surface Laptop.”

Surface Laptop: So Much to Love

Way back in 2012 when Microsoft introduced its first hardware laptop/tablet hybrid, dubbed “Surface,” we were first in line to purchase it.

Like many of our colleagues, we grew to prefer this hybrid concept over Apple's iPad. The Surface combined so many of the cool usability features of the iPad, yet retained the functionality of a business-oriented laptop.

Bill, of course, still values his iPad and other Apple devices and remains an accomplished ambidextrous Apple/Microsoft consumer. Phil, however, experienced a full-fledged Microsoft conversion when the Surface first appeared and has maintained a cult-like loyalty to the Surface brand. We waited breathlessly in 2016 for Microsoft's next iteration of the Surface Pro, but it did not happen.

When Microsoft finally did release the next Surface Pro in June 2017, we marched feverishly to our local retailer with pent-up anticipation to see what new features this fifth-generation hybrid device would offer. To our surprise, Microsoft had dropped the generation number from the name. The new device was simply called Surface Pro (not Surface Pro 5). Also to our surprise, the new Surface Pro did not look all that different from the Surface Pro 4 that we had bought 18 months ago.

We gripped our credit cards a little tighter in our sweaty hands as we read the specs on the new Surface Pro and realized there was no dramatic newness there. With disappointment mounting, we turned away thinking that the Surface fever perhaps had finally broken. Then we saw it.

Right next to the lackluster Surface Pro sat another first for Microsoft, a full-fledged laptop, simply named Surface Laptop. Now this was interesting — no detachable keyboard, no kickstand in the back ... this was a real laptop. Our grip on the credit card began to loosen and our heart rate accelerated as we realized that this was now the “must-have” device of the

season. We played with the demo model for about five minutes before plopping down our card, unexpectedly going home with the new Surface Laptop.

TECH BLISS

Since that impulse buy, our view of the Surface Laptop has grown even more favorable. This laptop is not too small, not too big. It seems just right for both travel and office use. The 13.5-inch screen is noticeably larger than the Surface Pro screen; this is a welcome enhancement. The keyboard is deeper and sports a fabric cover, which seemed odd at first, but now is actually pretty cool. Even though the laptop is larger than the Surface Pro, it feels thinner and lighter than when its keyboard is attached.

This laptop is more akin to the MacBook Air in aesthetics. We opted for the version with the i5 processor, 8 GB of RAM and a 256 GB solid-state hard drive. This configuration is plenty powerful and very responsive. (Moreover, the Surface Laptop is lighter and more portable than Bill's Surface Book, yet it seems just as powerful.)



We especially like the security feature that unlocks the laptop via facial recognition, which has worked well. Cortana also works well, and we were able to accomplish much of the initial setup via voice commands.

Microsoft touts a 14.5-hour battery life on the Surface Laptop. While we know we probably won't see that duration in actual use, we have noticed a great improvement in the battery life over our previous Surface Pro. We didn't have to purchase a new Surface Pen, as the pen on our Surface Pro 4 works just fine. The only caveat is that because this device has a traditional laptop form factor, you can't lay the screen flat in order to write with the pen or sign a document. This limitation doesn't really matter to us, as our penmanship pretty much sucks regardless of the angle.

One of the biggest surprises of the Surface Laptop — and perhaps its biggest negative (for us) — is what comes installed

on it out of the box. Microsoft introduced its new stripped-down version of its operating system, Windows 10 S, on the Surface Laptop. On the surface (no pun intended), there is no noticeable difference between Windows 10 Pro and Windows 10 S. The difference is that with Windows 10 S, Microsoft will only allow you to install apps from the Microsoft Store. This restriction, of course, is meant to enhance security by enforcing a sort of closed playground while working on the device (something that Apple has been doing for years). The problem is that there is a paucity of available apps in the Microsoft store.



For example, you can't install Chrome or Firefox browsers on Windows 10 S, because those apps don't exist in the Microsoft store. Certainly, many of the legal applications we still use on our laptop would not be installable on Windows 10 S. So, while the idea is noble (a computing environment with enhanced security) — and may be even desirable in certain institutions — we find the Windows 10 S restrictions very confining. But we were relieved to find out that on this Surface Laptop we are able to upgrade to full Windows 10 Pro for free through the end of the year. That decision is a no-brainer.

While we intended to purchase and test drive the new Surface Pro, we were distracted and taken by the Pro's new flashy cousin, the Surface Laptop. While the Pro has been a dependable workhorse through the years, it was getting a little boring. Surface Laptop was what we needed to spice things up, keep us up-to-date and feed our never-ending hunger for the latest and greatest devices. ■

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William Ramsey, Partner at Neal & Harwell, and LogicForce Consulting President **Phil Hampton** are best known for The Bill and Phil Show. The duo tours often and provides technology news and reviews on their website, www.thebillandphilshow.com.

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Top 7 Questions to Ask About a Long-Term Care Insurance Plan

By Ryder Kimmes



In conversations with legal management professionals and human resources professionals, we've found that firms fall into two categories:

- They have a long-term care insurance plan already in place.
- It's on their to-do list.

For the firms that already have a long-term care insurance plan in place, it's often promoted last on a list of many other benefits. Similarly, many legal management professionals are advocates of planning for long-term care needs, but attorneys and staff aren't asking about the benefit.

The truth of the matter is that attorneys and staff aren't asking because they don't know how long-term care insurance can benefit them. Human resources can educate and prepare them for their future need. This is key because the likelihood of needing long-term care during our lifetimes is 40 percent and jumps to 70 percent once we reach the age of 65.

Here are the top seven questions we've heard from ALA members about their long-term care insurance (LTCI) plan:

1. **How can I get my attorneys and staff engaged with LTCI?** It starts with education. You may consider communicating to attorneys and staff with a special campaign that falls off-cycle of your primary enrollment. You can also rev up your new hire strategy, which is an important time for this benefit. New hires can typically apply for coverage with simplified underwriting or guaranteed issue, which is something only you as an employer can offer.
2. **What should I do if my plan is facing a rate increase?** Communicate early and often. Leadership and staff will want to know as soon as possible so they have the most time to prepare. Consider offering a benefit comparison statement, which compares attorney/staff coverage with the rate increase to other products available in the marketplace. Analysis is key to making an educated decision.
3. **How do we go about offering multiple LTCI plans to attorneys/staff?** Many law firms have plans in place that may be closed to new entrants and don't have a current solution for attorneys/staff. Determine a strategic partner that can accommodate the grandfathered plan and a new solution. Ask your strategic partner if they can host both products on one website, and handle the billing and all attorney/staff inquiries.
4. **What services should I be receiving based on the commission this plan generates?** As a legal management professional, you're constantly evaluating what services you are receiving from vendors. Law firms offering LTCI have run into issues with billing, portability and technology. It's important to audit your list bill monthly, assist attorneys and staff with porting their coverage after leaving the firm, and offer a space for folks to easily view their LTCI offering.

5. **What's the process for filing a claim?** If you've ever filed a claim on an insurance policy, you know the process can be tricky. Attorneys and staff will be required to complete forms to submit the claim, discuss care coordination with the carrier, and understand what benefits they are entitled to. Look for a strategic partner that is a third-party advocate for your attorneys/staff to provide additional ease and support through this process.
6. **Should we be comparing our plan to current options in the marketplace?** Absolutely. When your current offering experiences a change or has been in place for many years, having a report that shows how that plan compares to others available to law firms is crucial. This provides peace of mind for knowing your attorneys and staff are receiving the best benefit available, and a due diligence report to share with partners.
7. **Is there recent legislation my attorneys/staff should be aware of?** There have been updates to Medicaid, partnership programs, and utilizing health savings accounts, to name a few. Give attorneys and staff an annual update

on what has changed legislatively regarding their LTCI plan, as well as posting information in a central location for everyone to view. Did you know many states have recently increased the enforcement of Medicaid Estate Recovery? This allows states to recover assets from the estates of individuals who utilize Medicaid to pay for their long-term care.

There are only so many hours in a day — vetting a strategic partner for your long-term care insurance can make the benefit more impactful for your partners, attorneys and support staff. ■

ABOUT THE AUTHOR



Ryder Kimmes is an Associate with LTC Solutions, Inc. and a long-term care insurance expert. His experience working with LTC Solution's Customer Service team lends his unique ability to understand the employee and the employer's perspective and assists him in successfully conveying the importance of long-term care insurance as an employee benefit to all parties involved. Kimmes is a HRCI instructor and has spoken to employers, brokerage firms and associations across the country about the current and future state of the long-term care insurance market.

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Lawyers' Evaluations: Still Very Few KPIs Used

By Jose Paulo Graciotti



According to Management Consultant Peter Drucker, knowledge workers are individuals who have “high degrees of expertise, education or experience and the primary purpose of their jobs involves the creation, distribution or application of knowledge.” Their evaluations consist of several factors ranging from the strictly objective to the more subjective and they can be defined by the business philosophy of the office where they work.

Before evaluating an individual's work, we should do an analysis of this specific professional and contextualize him or her in the kind of company where he or she works. The focus for this article is the lawyer (partner or associate).

We have to understand the particular behavioral psychology of a lawyer to analyze and understand the way he or she behaves.

According to Caliper Human Strategies (UK) Ltd., the following are some of a lawyer's main psychological features:

- Very low tolerance to failures
- High level of skepticism
- Great autonomy
- High reasoning ability
- High abstract thinking
- High sense of urgency
- Very low resilience
- Low socialization ability

Evaluators usually have some difficulties because they mix up some of the subjective indicators and the qualification or the background of the professional. Qualification factors — such as the technical or academic background, previous professional experience, specializations and languages — should only be taken into consideration at the time of the inclusion of this professional in the remuneration grid and in his or her career plan. They should not be used in the individual's periodic performance evaluation.

Another important factor that makes properly conducting an evaluation more difficult is in relation to the office: the lack of more elaborate objective indicators (obtained in management reports that should exist to help in the economic-financial management of each office). Many small and midsize offices still perform their own management, which is insufficiently professional and computerized. As such, the objective evaluation of their lawyers usually present a few indicators, such as appointments and invoiced hours.

The key performance indicators (KPI) should be much more encompassing and only consider its variation during the analyzed period. Then, there is a new barrier to overcome, as, when implemented, the evaluation policy ends up showing eventful previous distortions originated in the past of the professional, such as:

- Wrong insertion in the career plan and remuneration grid by the time of the contracting
- Insufficiently professional previous evaluations
- Lack of a well-defined career plan

The same way we wouldn't use pliers in place of a hammer, we must not use the performance evaluation to correct those distortions.

Lawyers could and should be evaluated on some of the following performance indicators:

PRODUCTIVITY INDICATORS:

- Billed hours/worked hours
- Billed hours/target of the hours defined by the office
- Billed hours/partners billed hours
- Billed hours in area matters/billed hours in other areas matters
- Billed hours in his or her matter/total hours billed in that matter (KPI for partners) corrected or cut hours

FINANCIAL INDICATORS:

- Net individual contribution (invoiced — salary)
- Worked gross amount/billed amount
- Billed amount/collect/received amount
- Percent participation in profitable matters or not
- Growth in the period
- Profitability of the closed/concluded matters (for partners)

CLIENT ACQUISITION INDICATORS/CROSS-SELLING:

- Client fee received in the period
- New matters opened by indication
- Billed hours/amounts generated to other areas



INSTITUTIONAL INDICATORS:

- Hours intended for speeches and organization of marketing events
- Hours intended for articles and publications
- Hours dedicated to the performance of internal training sessions
- Hours dedicated to pro bono
- Dedicated hours for office managing issues

SUBJECTIVE INDICATORS:

- Technical evolution in the period
- Managerial evolution in the period (team)
- Evolution in the client's management/matter (autonomy)
- Client's degree of satisfaction (whenever there is this type of research)

In addition to those KPIs listed here, we could add several others. However, it will depend on the existing managerial reports, as well as on the definition of their mix of values and weights, on the work philosophy and market ranking of each office.

Gaining the support of an outsourced and experienced consultancy firm — which is also exempt from internal political interactions — may not only help with this challenge, but also with defining the specific model to the evaluation of these professionals. ■

ABOUT THE AUTHOR



Jose Paulo Graciotti is a Consultant with Graciotti Assessoria Empresarial and an ALA member. He specializes in the governance, planning and organization areas, with sound knowledge in information technology and knowledge management. For the last 28 years, he was responsible for management and information governance on outstanding law firms in Brazil.

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Anniversaries, Awards and Appointments

MEMBERS ON THE MOVE >>>>



Julie K. Barrett-Becker



John P. Ferko



Kristine H. O'Connor, CLM



Carole Pierce

Julie K. Barrett-Becker, member of the Mile High Chapter, is now Director of Finance at Moyer White, LLP, in Denver, Colorado.

John P. Ferko, an Independent Member from Region 1, is now Chief Operating Officer at Richards, Layton & Finger, PA, in Wilmington, Delaware.

Kristine H. O'Connor, CLM, member of the New York City Chapter, is now Office Administrator at Cooley, LLP, in New York City, New York.

Carole Pierce, member of the San Diego Chapter, is now Administrator at Parks & Solar, LLP, in San Diego, California.

HELPING A MEMBER IN NEED

A longtime member and dear friend of the South Florida Chapter is in dire need of a kidney. Please read the letter from Victoria, L. Allen, CLM, and share with others if you know of a possible donor: alanet.org/docs/default-source/pdfs/bold-bites-files/kidney-donation.pdf.

HELP SHAPE THE FUTURE OF ALA: VOLUNTEER

ALA needs volunteers! Interested in serving in a volunteer role with ALA or know a member or business partner that may be interested? Check out the various roles and activities for the standing committees, conference committees and leadership roles. Then, submit your volunteer application or nomination by July 31: alanet.org/membership/volunteer-opportunities.





CHAPTER HIGHLIGHTS

- The ALA Philadelphia Chapter features a new video on its YouTube page that highlights its scholarship winners discussing their experience at the 2017 ALA Annual Conference & Expo in Denver. The “price” for winning a scholarship is that the recipients agree to participate in a video! Watch it here: www.youtube.com/watch?v=zK4cQcWf6Ak.

Want to share what your chapter is up to with other members? Send us an email to publications@alanet.org with details!

IN MEMORIAM

ALA recently learned of the passing of two of our longtime members. We extend our deepest condolences to the family, friends and peers of Susan Anderson and Ruth Pullin — both women were ALA members for more than 25 years. Susan was a member of the Puget Sound Chapter and an Administrator at Beresford Booth, PLLC, in Edmonds, Washington. Ruth was a member of the Nutmeg Chapter and she worked with Carmody Torrance, LLP, in Waterbury, Connecticut. We will greatly miss them.



Benefits and Savings – ALA's VIP Program

ALA teamed up with an elite group of trusted partners in business. Through these relationships, ALA members, along with their employers and families, are able to enjoy special benefits and tremendous savings.

For more information on ALA's VIPSM participating organizations and the services they offer, visit alanet.org/vip or contact ALA's Headquarters at 847-267-1252.

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► alanet.org/vip



ALA's 2017 Compensation and Benefits Survey

Enter your firm's data to help compile the industry's most comprehensive, up-to-date report on legal management professionals.

PARTICIPATION OPEN

Every year, new job titles and levels of responsibility crop up as the industry evolves, and ALA's Compensation and Benefits Survey helps define these new positions and their value to firms.



Discount if you purchase the report



Customized online dashboard for participants

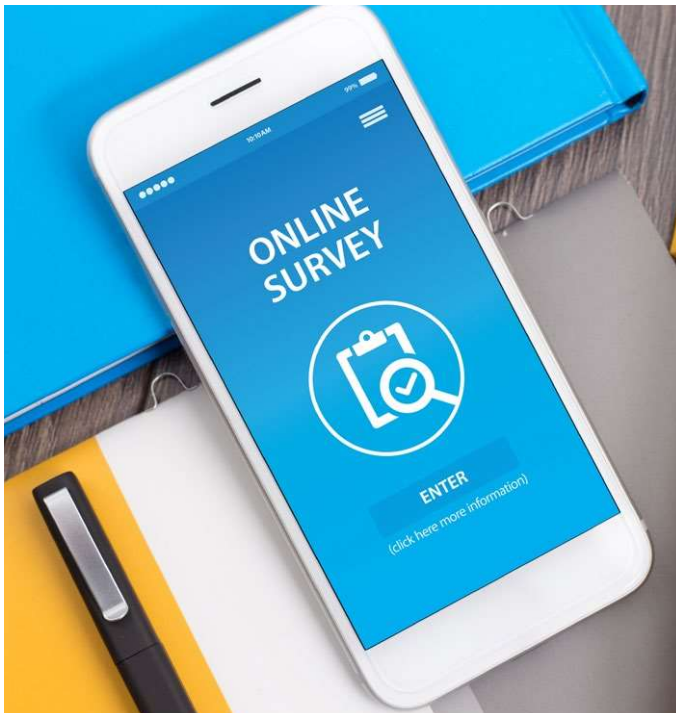


Ensure robust local data



PARTICIPATE TODAY
alanet.org/compsurvey

What's Happening at Headquarters?



PARTICIPATE IN OUR 2017 COMPENSATION AND BENEFITS SURVEY

It's that time of year when we ask members to participate in our annual Compensation and Benefits Survey.

By completing the survey, your office stays competitive by contributing to a more robust data set. The more firms that participate, the more localized and useful the results will be. **In fact, with enough participation for a local area or city, the report can include a dedicated section just for that city.**

Firms that complete the survey also save on the purchase price of the final report. By submitting your data, you also have the opportunity to access digital dashboards and customizable reports comparing your data locally or nationally, by whichever parameters are most useful.

Visit ilumen.com/surveys/ala/register to fill out the survey today! Participation closes on July 28.

ONE LOCATION — THREE AREAS OF INTEREST

ALA has education that fits the needs of Finance, Human Resources and Intellectual Property Professionals. Registration is now open for ALA's three specialty conferences, co-located this fall in Chicago.

Keynote Speaker Laura Goodrich will open the events with her presentation, "Creating a Mindset for Change." Following this keynote session, conference attendees will go to their respective breakout sessions for each specialty.

Additionally, this conference will feature a comprehensive Exhibit Hall with business partners to suit every specialty and multiple networking events for connecting with business partners, colleges and subject matter experts.

Register today: alanet.org/events/2017-events.

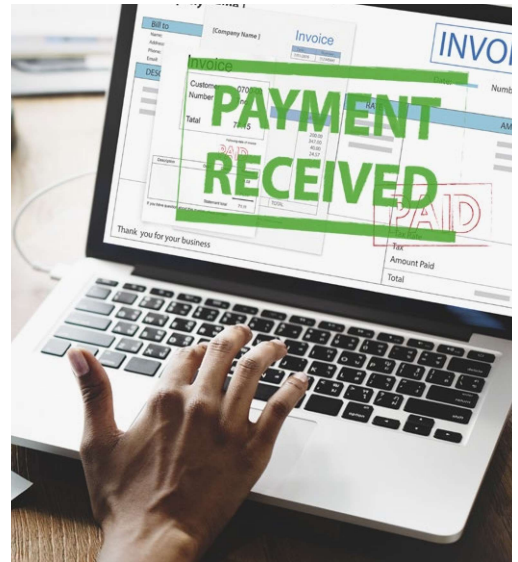


BEST ACCOUNTS RECEIVABLE PRACTICES FOR BILLING PARTNERS

With the growing trends in e-billing, alternative fee arrangements and client analytics of law firm providers, best practices have changed for the industry and individually firm by firm. Robert Karau is speaking at this fall's Regional Legal Management Conferences to illustrate the formulation of this best practice list, evaluate how to introduce and implement them with billing attorneys, and also evaluate them for particular firms, practice areas and clients.

Learn more about this and other education sessions at this year's conferences: alanet.org/events/2017-events/regional-legal-management-conferences. The same great education is offered in two different locations:

- West – Regions 4, 5, 6 in Las Vegas, September 7–9
- East – Regions 1, 2, 3 in Nashville, October 12–14



CHECKOUT THE NEW BOLD BITES ARCHIVE

Past issues of BOLD Bites are now available in our archive: www.magnetmail.net/newsletter/index.cfm?user_id=ALA_. This library allows our members to easily access past issues of the weekly newsletter.



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Our Career Center also provides a variety of resources to help you develop your skills and further your career. Check it out today: alanet.org/career-center/job-bank-overview!



CALENDAR

JULY 20–22

CHAPTER LEADERSHIP INSTITUTE

Minneapolis, Minnesota

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

AUGUST 3 | 2 PM, CENTRAL

MINDFUL MENTORING

Mentoring is an important element of retention in a law firm, and yet most firms devote little energy to it. In the context of developmental mentoring (cooperative or mentee-driven) relationships, a mentor must first know, understand and trust themselves before proceeding to develop an authentic relationship with a mentee. Only then can he or she focus on the wants and needs of the mentee. Mindfulness in this setting is nonjudgmental, present moment awareness.

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



AUGUST 3–5

LARGE FIRM PRINCIPAL ADMINISTRATORS RETREAT

Westin Boston Waterfront

Boston, Massachusetts

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



AUGUST 11

ATTORNEY AND MATTER PROFITABILITY

Large firm principal administrators face unique challenges in day-to-day work, and you play an important role in elevating your organizations to new heights. By attending this webinar you will learn to calculate profitability by analyzing education strategies for attorneys that will improve results.

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



AUGUST 22 | 2PM, CENTRAL

eMOD PATENT CENTER UPDATE

During this eMod Patent Center Update, key members from the USPTO will share updates with the development of Patent Center, which will replace EFS-Web and PAIR. Additionally, we'll discuss progress from the eMod Text Pilot Program, and information regarding the Patent Center Beta Program.

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



SEPTEMBER 4

LABOR DAY

ALA Headquarters Closed



SEPTEMBER 7

FINDING THE BALANCE BETWEEN TECHNOLOGY AND REAL ESTATE

Technology continues to evolve the practice of law, but many firms do not consider how these advances also affect their portfolio and space planning requirements. In today's competitive marketplace, law firms must consider how to reconcile the need to stay technologically nimble while planning for their real estate needs many years down the line. Join this webinar to learn how to bring together your firm's technology and real estate needs.

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



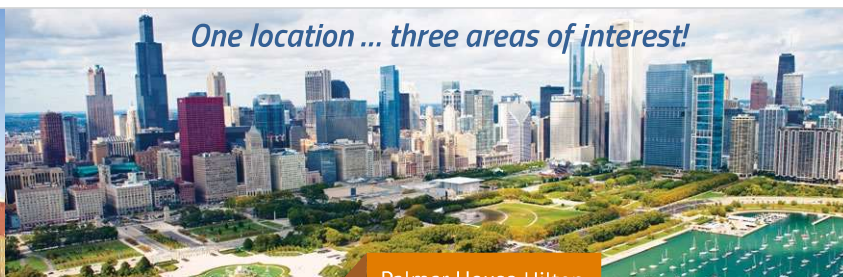
SEPTEMBER 7-9

REGIONAL LEGAL MANAGEMENT CONFERENCES – WEST

Venetian Las Vegas

Las Vegas, Nevada

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



One location ... three areas of interest!

Palmer House Hilton
Chicago, Illinois



2017 REGIONAL Legal Management CONFERENCES



West (Regions 4, 5, 6)

September 7-9, 2017

Venetian Las Vegas
Las Vegas, NV



East (Regions 1, 2, 3)

October 12-14, 2017

Renaissance Nashville
Nashville, TN

SPECIALTY CONFERENCES FOR LEGAL PROFESSIONALS



October 5-6

Intellectual Property
Conference for Legal
Professionals



October 5-7

Finance and Law
Practice Management
Conference for Legal
Professionals



October 5-7

Human Resources
Conference for Legal
Professionals

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