

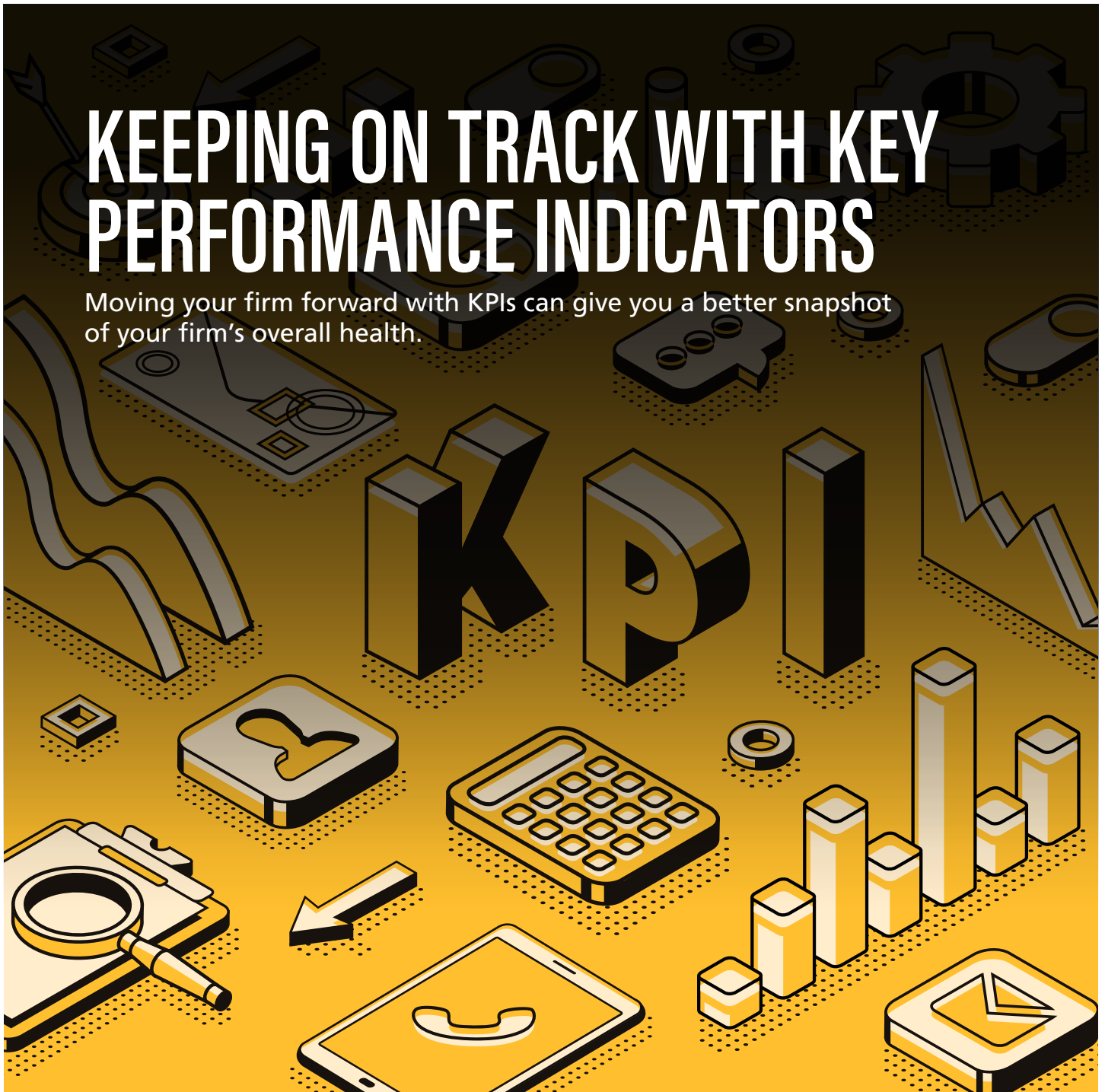
LEGAL MANAGEMENT

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KEEPING ON TRACK WITH KEY PERFORMANCE INDICATORS

Moving your firm forward with KPIs can give you a better snapshot of your firm's overall health.





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Thankfully, It Never Stops

The year went by quickly. I am almost done with my term as ALA President and I could not be more thankful for the education I received over the last year. I learned a lot about myself and even more about leadership. Some may think that once you take over this type of a leadership role, it's because you have finely honed your leadership skills. I am happy to report that is not the case. Thankfully, there is always so much more to learn.

“

No one is perfect, and that should be expected and embraced. If you are vulnerable as a leader and open yourself up to those around you create a great trust.”

For me, leadership has always been about experimentation. I go with my gut a lot, and I spend a lot of time observing what is going on around me to get a read on the room or situation. Leadership also requires patience toward yourself and others. It requires you to be very in tune with those with whom you are working; leadership should be fun and should equally fill and empty your buckets.

Here are the three most important things that I learned about leadership this past year:

- **Be vulnerable and have humility.** No one is perfect, and that should be expected and embraced. If you are vulnerable as a leader and open yourself up to those around you, you create a great trust. This trust encourages stronger collaboration, fosters a positive-conflict environment and creates a greater opportunity for wider perspectives. If you make yourself vulnerable, everyone in the room will follow. If you make a mistake or change your mind, that's OK — shout it from the rooftops. If you try to hide things, it discredits your authenticity. Everyone appreciates a leader who is open and honest and creates trust.
- **Be accountable.** Like it or not, people are counting on you. If you say you are going to do something, do it. And, if you find yourself in a situation where you cannot meet the deadline, speak up and ask for help. The best leaders are those who do not do everything themselves. What better way to foster succession planning and real buy-in from the entire team than to share the work and make everyone a part of the movement — not just by soliciting opinions, but by putting words into action?

- **Be communicative.** How many times have we heard that you can never communicate too much? I am still surprised by how much communication is appreciated by others. It never hurts to let people know what is going on, even if all that is going on is that you are still thinking about it. The void created by silence is always filled by something, so it might as well be filled with information. Let people know what you are thinking about doing, even if a final decision has not yet been made. You may receive some very helpful feedback that adds value to your ultimate decision.

Even though I have spent a lot of time learning about these topics over the last year, I definitely do not have them

perfected — and I'm thankful for that. I encourage you all to experiment with your own leadership skills, whether it's in your workplace, in your local chapter, at home or in a community organization. For me, leadership is the gift that keeps on giving me an education. I thank all of you for allowing me to learn while I served the Association and you! ■



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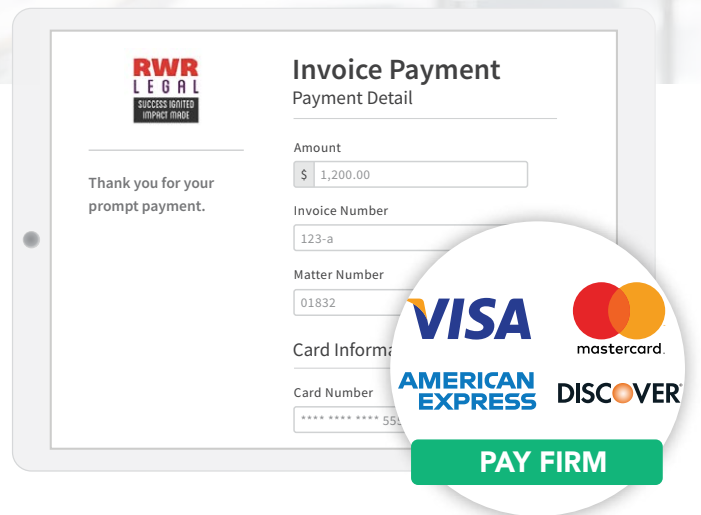
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Global Legal Hackathon Lands in Chicago



For the second year in a row, ALA participated in the annual Global Legal Hackathon. This year, ALA teamed up with iManage, a document and email management company specializing in artificial intelligence, to host 43 people from the legal industry and the developer community to discuss key legal challenges and actively determine solutions for them. The Global Legal Hackathon is the largest legal technology innovation event in the world.

Four teams were assembled and worked over the course of a weekend, February 22-24, at iManage's Chicago headquarters to come up with a plan to rapidly develop solutions to improve the legal industry.

"Everyone came to the hackathon with the idea of wanting to improve the legal ecosystem. And the teams really did focus on how to make the legal industry a better place for people from firms of all sizes," says ALA President-Elect James L. Cornell, III, who participated in the hackathon for the second time.

The teams focused on a variety of challenges, including offering an efficient pricing and budgeting solution for

attorneys who do not have sophisticated systems; they built the system using ALA's own Uniform Process Based Management System (UPBMS) taxonomy. Another group studied the deployment of laws and legal practices as interventions and enablers of effective public health administration, while another team outlined the premise for a self-learning technology review platform without vendor bias.

Ultimately the winning team's innovation was IntelliWHY, an application created by lawyers, technologists and legal management professionals that aims to save the lives of lawyers by improving law firm culture.

"Law firms can be unhealthy places because of the rigors of a client-focused culture and high-pressure, high-speed working environment — there's great unhappiness and dissatisfaction with the practice of law because of these factors," says Cornell, who was one of the architects of IntelliWHY.

"Creating happy and healthy lawyers and professional staff will shift the culture at firms to be better places to work. When healthy and well, people perform at a higher level and are better employees."



Created in response to Millennials, who may be more amenable to change, replacing Boomers as the largest generation in the workforce, IntelliWHY provides individuals with insights about their own stress indicators to inform their behavior and even suggest self-care techniques the user has programmed. And it gives firms the ability to assess the well-being of their talent and use that anonymized, collective data to make informed decisions on what can change for the better. The information gathered can also be used to

benchmark key performance indicators of a firm to establish the correlation of better financial and practice performance to the health and well-being of the firm’s personnel.

Other members of the winning team included Brie Leung, Holly Barocio, and Deb Baker from GrowthPlay; Kelly Dawson of Shook Hardy & Bacon, LLP; Chris Martinez and Ayman Hatem from BigHand; and Dugald Hamilton of 23Legal.

“Participating in the Global Legal Hackathon will go down as one of my favorite collaborative experiences of all time,” says Leung. “Our team of eight had every hallmark of a diverse team with a mix of nationalities, ethnicities, ages, genders and professions, and we came together because of a singular interest in solving a crucial problem in law firms (should we use the term legal organization to be inclusive of in-house legal counsel and others?).”

The IntelliWHY project will compete in the Global Legal Hackathon’s virtual second round. Finalists will be announced March 25 and invited to demonstrate their solutions in person to a panel of judges at the GLH Gala and Finals in New York City. ■

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ARUP DAS
CEO, Alphaserve Technologies

Creating a Culture of Innovation

Innovation is a trending term in many industries today, and the legal market is no exception. As the world continues to get more connected and technology continues to promote new, simpler and more efficient ways of doing things, law firms are recognizing that staying competitive requires the delivery of their services in new and creative ways.

“

Firms that are successful at change management and innovation tend to have an important thing in common — a culture that supports and promotes those efforts.”

Today, progressive firms and even many that have not traditionally been leaders in technology adoption are seeing the need to prioritize innovation as a way of staying competitive. While some are creating entire departments led by C-level executives focused on their innovation strategies, others are outsourcing those initiatives or implementing new solutions on a more ad hoc basis. Regardless of the path they choose, firms that are successful at change management and innovation tend to have an important thing in common — a culture that supports and promotes those efforts.

WHY CULTURE MATTERS

Innovation doesn't necessarily function like a traditional practice area or operational department within a law firm. As with most initiatives, innovation efforts require a process, a budget and clear accountability, but culture also plays an important part in a successful innovation strategy. If the organization doesn't actively promote and support change and the desire to make improvements, its efforts to be innovative will often fall short.

This is certainly true for law firms — the legal industry continues to fight its reputation for being behind the curve in modernizing. For many, the trappings of this history as late adopters become a self-fulfilling prophecy. Firms aren't expected to be change agents or early adopters, making it easy for them to simply keep things as they are.

Being innovative isn't just about using modern technologies like artificial intelligence (AI), data analytics or automation. It's also about having the ability to envision things differently and the agility to make smarter decisions that improve practice and business operations.



Innovation requires curiosity, creativity, patience and optimism. Establishing a focus on the initiative requires a firmwide positive attitude and a culture that fosters the acceptance and use of those new tools and processes. This starts at the top, with firm leadership.

IT STARTS WITH LEADERSHIP

A law firm isn't just an office building or a set of practice areas, but the people who work there. And these people, their attitudes and their personality traits are largely what contribute to the firm's overall culture. Generally, leaders establish this type of culture by embracing and demonstrating the attributes with which the firm wants to be identified.

A culture of innovation must start at the top and be emphasized throughout the firm. This includes leading by example, which means executives and partners must embrace modern tools and technologies that improve efficiency or client service. As early adopters, they will model the behaviors their staff will follow; if they show resistance or negativity about change, their departments will likely do the same.

Strong leaders can bring people together, even those with competing interests. They help promote open communication and collaboration, encouraging different groups to work together. This is especially important when a firm introduces new and innovative tools and technologies, because in addition to developing solutions, they must also implement them. Successful integration of new systems or processes is dependent on users embracing the change, and that is more likely to happen among people who feel included in the process.

The right culture fosters an environment in which firm leaders are willing to listen and staff are willing to share their concerns and ideas for improvements. Firm leaders should encourage staff's involvement in the design and

implementation of new solutions to provide everyone with a sense of ownership in a project and its ultimate success. Supporting efforts around training ensures employees are adequately prepared to use new tools increases acceptance. By promoting a culture of innovation, ideas are generated from within the organization, and people are less reluctant to change overall.

Qualified leaders can develop a firmwide strategy that promotes a holistic approach to innovation, so new solutions are successfully created and integrated into workflow. It is not enough to generate ideas or even develop new tools or processes, because until those solutions are fully implemented and functioning, the firm will not realize any meaningful return on investment (ROI).

Creating an innovation program is a good idea for most firms, regardless of size or current structure. In an increasingly competitive legal market, firms must find new ways to improve their internal processes and business operations, as well as discover new solutions that improve client service delivery. Firms with the right leadership and an overall culture of innovation that includes a positive attitude and effective change management are more likely to find success than those without. ■

ABOUT THE AUTHOR

Arup Das is Chief Executive Officer (CEO) of Alphaserve Technologies. He is an expert in institutional-level technology governance and operational risk management standards that are prevalent in hedge funds, private equity funds, venture capital funds and global law firms. Das regularly writes and speaks for legal and other audiences on topics related to digital transformation. In 2018, he received the International Legal Technology Association's Thought Leader of the Year award for his expertise and commitment to sharing his knowledge and insights about critical technologies and trends impacting the legal market, including artificial intelligence, data science and analytics, blockchain, development operations, automation and innovation.

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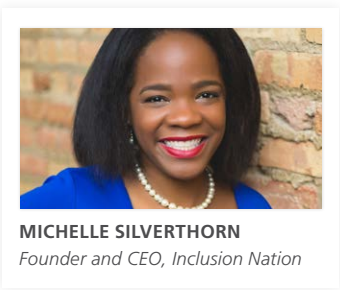
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MICHELLE SILVERTHORN
 Founder and CEO, Inclusion Nation

Create an Authentic Workspace Where Diversity Matters

Last December, the legal profession was shaken by the release of a picture of a large New York law firm’s all-white, almost all-male partner class. The response was strong — letters and counter-letters and counter-letters to counter-letters.

“It’s why our diversity numbers will never change. Because diversity without authenticity is diversity without teeth. It’s diversity without work.”

But as someone who teaches diversity and inclusion, I wasn’t surprised by the picture. Because it broadcasts a wider truth about diversity, obvious in the legal profession, but just as easily seen across corporate America. That we pay lip service (and a lot of money) to diversity, but we still haven’t done the hard work to make that diversity matter.

The legal profession is 85 percent white, which is better than 10 years when it was 89 percent white. It’s 64 percent male, which again is better than it was 10 years ago when it was 68 percent male. And in large U.S. law firms — like the one that released the picture lineup — 77 percent of partners are men, and 91 percent of partners are white. Those white male partners are the ones with the clients, the ones with the access to power, and the ones who continually reinforce the all-white-male partnership ranks, year in, and year out.

IT STARTS EARLY

How does it work? Let’s meet Dave and Sondra. Dave is a young white man. Sondra is a young black woman. They both graduated from different law schools at the same time. They go to work for the same large law firm. They enter the firm at the same level, in the same practice group — but then something changes.

It starts with the assignments. The projects and assignments that Dave is getting are more complex and trickier than the ones Sondra’s getting. Because Dave is meeting new people from socializing. He’s socializing with those white male partners. They’ve invited him out

places, they meet up for drinks in their neighborhoods, they stop by his office to catch up, talk about their work, and offer him new work.

Meanwhile, Sondra doesn't get invited to these casual social meet-ups. The white male partners don't drop by her office to see if she's busy and wants a chat. She reaches out and to ask what she can help with, but it always seems to be on her to do the work. When she's wrapped up a project, she'll hear that she did good work, but then there's no follow-up.

Then Dave and Sondra get their evaluations. They're both good, but Dave gets a lot more positive growth-oriented feedback, while Sondra's is a lot more neutral — it isn't really positive; it isn't really negative. Just says keep doing what she's doing.

Sondra continues to do her work. She bills and bills, but she doesn't really feel like a part of the workplace; she doesn't feel supported. She has a lot of new ideas but when she brings them up to leadership, they don't go anywhere. She keeps billing the hours, she goes to lunches and dinners, and she makes sure to attend the business development trainings and the affinity group meetings.

Then a leadership position opens up — maybe it's a partner position, or a promotion to get on the partner track. Sondra



thinks she's going to get it, but Dave gets it, not her. Sondra asks why, and she's told the truth: "No one knows you. No one talks about you in meetings. Your evaluations aren't great, and there were some concerns about your performance."

Naturally, Sondra protests — she's never heard any concerns about her performance before, she goes to all the events, she's a mentor, and she's even on the firm's front page touting diversity.

And they say, "That's not enough. How did you not know that? Look at Dave, he got great work, and went to the meetings that mattered. He had the right clients, knew people around here, and partners talk about him — they promote him. He's clearly committed to success, and you really aren't leaning in enough. Partner isn't really where you're going to be. Here are some other ideas for you."

So Dave gets promoted and Sondra decides that she's going to have settle with the place that she is in — or leave.

WHY DOES THIS HAPPEN?

Now why did Dave get the work and Sondra didn't? Why was Dave given more opportunities and Sondra was not? The reason is race. Race is the reason Dave gets promoted and Sondra does not.

It's because the white partners like Dave. They're comfortable with Dave. They talk to Dave. They take Dave out. They promote Dave. They hang with Dave. They give Dave their clients. They give Dave the good work. They give Dave the growth-oriented feedback.

But not Sondra. They're too uncomfortable around Sondra. She doesn't talk like they do. She didn't go to the same schools that they did. She doesn't live in the same neighborhoods as them. She doesn't like the same sports they do. Socializing with Sondra feels like work. They don't tell her how she does in her evaluations because they're worried about offending her or saying the wrong thing. And there are some whispers, however faint, of the phrase "affirmative action." All their behaviors and statements send a clear message — Dave belongs here; Sondra does not.

But there's a twist. See the story doesn't end there. Because Sondra knows all of this. She knows that when a white executive says, "I don't see color," that's not true at all. He sees color in the neighborhood he grew up in, in the

neighborhoods he chooses to live in, in the friends he has, in the books on his bookshelf, in the schools his kids go to, in the music he listens to, in the shows he watches, in his doctor, his dentist, his accountant, in the lawyers he promotes in his firm.

So here's what Sondra does. Like so many minorities working in a majority workplace, she has to put on a mask. She code-switches. She lives a double life. She constantly vets her thoughts, checks her behaviors, corrects her actions, works and works and works, trying to conform to workplace norms and values that won't change for her and were decided when people who looked like her weren't even allowed in the room. But it still doesn't work. Because the mask doesn't fit her. It was never designed to.

Sondra doesn't just leave because of the exclusion. She leaves because of the mask as well. She leaves because while the firm says they want diversity, they want it without authenticity. They want it with assimilation.

YOU HAVE TO WANT CHANGE

It's why our diversity numbers will never change. Because diversity without authenticity is diversity without teeth. It's diversity without work. It's diversity that doesn't make anyone feel uncomfortable. It's diversity that doesn't make anyone change. If you are a white male leader asking yourself why the workplace isn't getting more diverse, then I want you to be honest. Do you want the workplace to change, or do you want it to stay the same? A workplace

where diverse people must assimilate, where diverse people must mask, because inevitably, do you know what will happen? Those same diverse people will leave.

It's easy to hire diversity. It's much harder to make that diversity matter. We have to create workplaces where diversity does matter, where people like Sondra can enter the workplace, take off their masks, be seen for their authentic selves, and be told, "There is space for you to succeed. I am willing to do the hard work to make it happen. Because you belong here." That's real diversity and inclusion. ■

ABOUT THE AUTHOR

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

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Effective Employee Engagement

Finding the right ways to motivate employees can increase productivity — and your bottom line.



KYLIE ORA LOBELL
Freelance Writer

In workplaces throughout the United States, employee motivation and engagement are alarmingly low.

According to Gallup's 2017 State of the American Workplace report, a mere 33 percent of U.S. employees revealed that they are engaged. In addition, only 21 percent of employees said they strongly agree that their performance is managed in a fashion that motivates them to do outstanding work.

So if your firm employees are getting their work done, do you really need to focus on their level of motivation and engagement? The answer is a resounding yes. For starters, it's been found that organizations with higher than average levels of engagement among their employees experience 50 percent higher sales, 27 percent higher profits, 50 percent higher customer loyalty levels and 38 percent above-average productivity.

If you want to motivate your employees and boost your firm's bottom line, there are a number of strategies you can implement to start ticking that engagement level up.

It's been found that organizations with higher than average levels of engagement among their employees experience 50 percent higher sales, 27 percent higher profits, 50 percent higher customer loyalty levels and 38 percent above-average productivity.

TAKE TIME TO HIRE THE RIGHT PEOPLE

Getting employees motivated starts with hiring the right people in the first place. According to Jason Savage, Chief Operating Officer at the Law Office of Kenneth E. Berger, your hiring process needs to be very thorough. This means that you should take a little more time to search for the right person to hire.

"The best candidate will actually enjoy their work and understand how every task they complete creates a better result for their clients," Savage says. "If you hire the best people, they keep themselves motivated by striving for excellence."

OFFER SUFFICIENT BENEFITS AND COMPENSATION

When looking for the best candidates out there, you need to be prepared to offer excellent compensation and benefits, as well as bonuses and raises for outstanding performance. Look at what competitors are offering and analyze what compensation and bonus system works for your firm. Then, find the sweet spot that will attract the best law firm employees in your area.

"When employees recognize how their compensation is directly tied to their performance, they'll remain motivated to be productive and constantly raise the bar of their work," says Savage.

Figure out what you can do to free up time for your law firm employees, whether it's changing their software or assigning another employee to support them.

USE "NINE MINUTES ON MONDAY" TO IMPROVE LEADERSHIP AND ENGAGEMENT

Too often, employees are focused on doing their day-to-day tasks instead of on the bigger picture. Employees are usually over-managed, under-led and not living up to their full potential, according to James Robbins, a motivation specialist and creator of the Nine Minutes on Monday employee motivation program. Robbins will also be presenting on this

topic at ALA's 2019 Annual Conference & Expo (alanet.org/conf19) this April. Using the key principles from his program, law firm managers can increase motivation and engagement.

"[It's] a simple framework to help managers stay out of the weeds and instead focused on the key activities that drive employee engagement," says Robbins. "It's essentially a map to follow that doesn't take a lot of time and yet yields big results by bringing you back to the things that matter most."

Some key teachings from Nine Minutes on Monday include:

- Learning what the top engagement factors are and then implementing them
- Showing employees how what they do affects the organization
- Developing a formula for giving feedback that takes the stress out of addressing subpar performance
- Discovering how to use recognition codes to recognize and reward employees so they feel valued, inspired and appreciated

The program is about the little things managers can do on a consistent basis that "involve linking purpose to pay, helping employees experience autonomy as well as having meaningful goals with feedback," says Robbins. "Great leadership is largely skill-based and can be improved upon with some intentional practice. Know what great leaders do and then keep doing those things until you get better and better. Your people will love you for it."

GIVE EMPLOYEES DOWNTIME

Billable hours and set schedules encourage employees to work for at least eight hours per day, every workday. However, giving them some space to take a break is going to motivate them. Figure out what you can do to free up time for your law firm employees, whether it's changing their software or assigning another employee to support them.

"We can't ask people to work every minute and expect perfection," says Abby Rooney, Director of Human Resources at

Your firm's employees need to be constantly growing in their careers. Managers should be challenging employees to be better by broadening their skill sets and taking on new tasks and roles.

Foley & Mansfield, PLLP, and the 2018-2019 President of ALA's Minnesota Chapter. "There is a case for downtime, team building and just taking a break. Finding a balance is challenging. We try to find ways to eliminate the pain points our timekeepers have. Do they need a third monitor? Do they know how to use the software effectively? What could a support person take off their plate to allow them to focus on their work?"

CHALLENGE EMPLOYEES TO BE BETTER

Your firm's employees need to be constantly growing in their careers. Managers should be challenging employees to be better by broadening their skill sets and taking on new tasks and roles. "People are most motivated when they are doing work that is challenging to them, over which they feel some level of control and autonomy and that they can see contributes to some bigger picture," says Charles D. Brown, Managing Partner at Brown, Christie & Green.

If you challenge employees, Savage suggests you make sure to arm them with the right skills and knowledge to face challenges head on through frequent internal and external trainings. "Empowered employees are productive employees."

HAVE FUN TEAM-BUILDING ACTIVITIES

Getting together every once in a while to take a break and have an enjoyable time is crucial for team building and cultivating motivation. Brown says that at his firm, they have a fun day, a happy hour, a party or an extra day off once a quarter. "These things are an inexpensive way to recognize the work and effort my team puts in on a day-to-day basis."

PROVIDE CONSTRUCTIVE AND POSITIVE FEEDBACK

Giving constructive feedback to employees is a crucial step in the Nine Minutes on Monday program. Positive feedback is important as well, because it drives motivation.

Robbins says that while corporate rewards programs are great, they are "not a replacement for each individual manager to be able to say something nice to their staff. The best way to reward someone is to appreciate their efforts and acknowledge how they make a difference in the organization."



According to Rooney, when you recognize an achievement, you should do it in a way the employee would like to be showcased. For example, you could announce his or her achievement to the entire company or simply email a "kudos" message. "Bonuses and gift cards are appreciated but don't have the lasting effects of positive feedback," he says.

SMALL STEPS

In the frenetic pace of today's firms, finding time to implement some of these steps in jam-packed days can be challenging. But investing in the time upfront to find the right employees — and taking the time along the way to remind employees of their value — can go a long way to making your employees more engaged. ■

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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Keeping on Track with Key Performance Indicators

Moving your firm forward with KPIs can give you a better snapshot of your firm's overall health.



DREW AMOROSO
Founder, DueCourse

In the age of big data, firms must be serious about using data to fuel their growth and adapt to the ever-changing business landscape. One essential way to use data to drive decision-making is to establish key performance indicators, or KPIs.

KPIs are a type of performance measurement that helps law firms evaluate how effectively the company is achieving key business objectives. Firms use KPIs at varying levels to measure performance and track statistical information that provides important insights into the current state of the firm and its processes, and to help make decisions about the direction in which it's headed.

If you're looking for ways to measure the financial health of your firm, accelerate its growth or improve the quality of your client service, consider the following.

WHY KPIs

For many firm owners and decision makers, the prospect of identifying, tracking and

Firms that engage in the measurement process learn the truth about the strength of their business and how it is functioning. Without measurable data, decisions are made based on intuition, past experience, best guesses or “gut feelings.”

measuring KPIs can seem like a monumental undertaking — so why devote the time and resources in the first place? There are numerous reasons.

First, firms that engage in the measurement process learn the truth about the strength of their business and how it is functioning. Without measurable data, decisions are made based on intuition, past experience, best guesses or “gut feelings.” And while these inputs can sometimes be instructive, they simply cannot replace the clarity and insight that comes from the ability to analyze real, ground-level data.

Consider these examples. Let’s say you notice that your firm was unusually busy last month fielding inbound leads with potential new clients — which might lead you to assume that your firm is experiencing a spike in new business. But this observation can be misleading if you’re not tracking the numbers associated with this influx. For example, maybe only 50 percent of potential clients who scheduled meetings actually showed up, and your sales team was only converting 20 percent of those meetings into paying clients. Your firm was, indeed, very busy scheduling meetings with potential new clients. That said, the busyness you observed did not actually translate into the amount of new paying customers you assumed.

Here’s another one: Let’s say the firm settled four large cases this week, which leads you to believe that you have the funds available to launch the new marketing campaign you’ve been waiting to roll out. But that decision, too, can be problematic if it is not tied to the numbers behind the cases. Perhaps your staff had been working on each of those cases for 18-plus months and you were paid a flat fee that barely covered their salaries during that period, leaving you to foot the bill for your overhead.

In both of these examples, what you’re observing with your eyes may not actually be backed by the numbers.

Second, the data that comes from measuring KPIs arms you with the ability to make proactive decisions rather than constantly operating from a reactive posture. “With more

data, you can transform your firm from an organization that is strictly reacting to the results that you’re getting to a firm that is not only planning for results but adjusting your actions based on a desired outcome,” says Melanie Leonard, an Efficiency Designer at [streamlined.legal](#). “If you know things like your conversion rates or how much it cost you to provide a particular flat fee service offering, you will be able to calculate exactly how many prospects you need to create exactly the amount of volume or profit the firm is aiming for.”

Third, KPIs allow your firm to refine its processes and procedures and make major decisions about the day-to-day operations as well as the long-term strategy of the firm. Key indicators give insight into things like how much it actually costs to bring new, paying clients to the firm, the time and resources it takes to handle a case from start to resolution, and whether your attorneys and staff are spending their time appropriately and fully utilizing the resources of the firm.

All of these insights empower your firm with the information it needs to make important decisions about your short- and long-term direction.

IDENTIFYING METRICS THAT MATTER

It is hard to dispute that KPIs are effective in helping firms make business decisions. However, the challenge for many firms is how to identify the metrics that matter.

“A good starting point for many firms is to home-in on their decision-making processes,” says Leonard. “Where have you ever thought, ‘If I only had this information, this decision would be easier?’” She says many firms begin with more common KPIs like revenue, the response they’re getting to marketing efforts (measured by a call to action), the conversion rate of their sales, the amount of time (and, as a result, cost) it takes to produce each service offering, and their client’s rate of satisfaction (based on a Net Promoter Score).

These common KPIs can be supplemented with indicators that are specific to your practice area or your way of doing business. For example, says Leonard, “an immigration practice may want to know how long it takes for a particular visa to

be approved so that they can decide how best to structure a payment plan for those clients. Or an estate planning practice may want to know when and why their clients are coming back for amendments so that they can try to anticipate that timing and target those individuals in future marketing.”

In addition to helping make business decisions for the firm, consider tracking indicators that will help advise clients on how to move forward. For example, Leonard says a personal injury practice may want to know if there is a correlation between settlement offers and the assigned adjuster or insurance company. “This kind of information enables firms to better predict and prepare their clients for a particular type of settlement offer,” she adds.

Jobst Elster, the Head of Content at InsideLegal and a regular *Legal Management* contributor, suggests that firms might be best served to start with their biggest challenge area, like better understanding and listening to their increasingly demanding clients. “Not a corporate legal/inside counsel survey goes by without [general counsels] expressing their dissatisfaction with outside counsel service, ranging from communications to billings, pricing, outside counsel guidelines and standards, as well as use and mastery of legal technology,” says Elster. “Why not pick a few of these as a starting point with the realization that not all measurement has to be complicated? When is the last time you asked your clients how happy they are with you, full stop?”

One word of caution — firms often fall into the trap of thinking they need to start by collecting and analyzing the mountains of data they may have from the past. Don’t let the challenge of analyzing past data prevent you from starting to identify your KPIs and collect data moving forward right now. “While this past data may be helpful in some circumstances, chances are your firm has changed enough that it may not be applicable to the way you do things now,” says Leonard.

ESTABLISHING KPIs AND THEIR BENCHMARKS

Once you have identified the KPIs you want to track, the next step is to establish benchmarks.

For many firms, establishing a benchmark is challenging because it requires some initial guesswork and the process is often tied to goals your firm may not have set yet. Identifying KPIs is an excellent opportunity to have an open conversation about the key objectives the firm wants to achieve, which

will lead to natural starting points for identifying indicators and their associated benchmarks.

If you are unsure how to begin, Leonard counsels firms to start from where they are. “If you don’t yet know where you are, make your best educated guess,” she says. Try to avoid the paralysis that may come from not seeing a natural starting point — and get started using the information you have at your disposal.

“Much like a science experiment, once you’ve determined the KPIs that will be helpful to your firm, document them along with your desired result. Make your hypothesis and write it down so that once the data comes back, you’ll have something to compare it to,” says Leonard.

By comparing the data to your desired results, or goals, you’ll be in a better position to objectively determine whether you hit your target — and whether you’re measuring the right

The data that comes from measuring KPIs arms you with the ability to make proactive decisions rather than constantly operating from a reactive posture.

information in the first place. From here, you can make changes based on real information — not a gut feeling — and use further data to determine what effect those changes had on your results.

“[Remember], benchmarks are just that,” Leonard. “They are marks that guide and help us make determinations and decisions. And as your goals change, so too will your benchmarks.”

TRANSLATING KPIs INTO BEHAVIORAL CHANGE

Once you’re armed with the information, the most important step is to put that information into action by enacting behavioral change at the firm. In other words — decide how you are going to use the information to identify firm goals, rework processes and procedures, and refine how your attorneys and staff are spending their time, among other things.

When translating information into action steps, Elster believes the key is transparency and accountability. “Firms need to be more open about what is being tracked, measured and why, and make this accessible to more users and stakeholders.

Identifying KPIs is an excellent opportunity to have an open conversation about the key objectives the firm wants to achieve, which will lead to natural starting points for identifying indicators and their associated benchmarks.

Measurement and KPIs are still extremely siloed and relegated to specific operational/functional areas.”

By increasing the visibility and transparency of the firm’s KPIs, a firm dovetails their top priorities into accountability and the willingness, once bought in, to work together to not only achieve specific metrics but also implement results, says Elster.

In addition to transparency, ensure that the firm is translating and memorializing this information in key process and procedure changes. This may mean changing the way something has always been done — but that disruption is an essential element of making progress and implementing the insights the firm has gained.

Importantly, don’t overlook the absolute necessity of training all of the impacted employees on how to implement new procedures and process changes. Giving employees new goals and directives without the necessary training and support to help them achieve those objectives will lead to poor results and lack of direction. Always spend time giving your teams the foundational tools they need to achieve the strategic aims of the firm.

Finally, make it part of your firm’s management culture to regularly create, track and evaluate KPIs. Make it an essential part of your management meetings and assign individuals ownership over implementing and reporting back on progress that’s been made. ■

ABOUT THE AUTHOR

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

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Equipping Your Firm for the Opportunities of Blockchain

How to tell if your firm is ready to take on a blockchain or cryptocurrency practice.



TERENA BELL
Journalist

Is crypto a currency or a commodity? Either way, the debate's a potential gold rush for law firms — or at least, that's what partners hope as firms add blockchain to their practice areas, protecting client investments, managing their initial coin offerings, and more.

Take for example Cogent Law Group, a Washington, D.C.-area firm that marketed blockchain more than any other practice area last year. Founding Partner Tom Goldstein believes there's money to be made, but only if the work is a match.

Just as some firms are poorly suited to take on personal injury or patent filings or other particular areas of law, crypto and blockchain aren't for everyone either. So how do you know whether opening a new practice is the right move for your firm? From an HR and technical perspective, how can you tell you're ready?

DISTINGUISHING CRYPTO AND BLOCKCHAIN

For starters, Goldstein says, "If you're going to have a practice, certainly you better know what the difference is between blockchain and cryptocurrency." Blockchain is a transparent database

If your firm doesn't have that go-to employee with the time and technical skill to research wallets, crypto is not for you.

ledger that tracks the movement of data across a peer-to-peer network. To participate in this network, people often use cryptocurrency — or crypto for short. Like cash money, crypto carries financial value. But unlike the dollar, the euro or other fiat currencies, cryptocurrencies aren't issued by a government. Instead, blockchain leaders make and sell their own tender specific to that system — or use existing cryptocurrencies or maybe not even require the use of crypto at all. It just depends on the network.

Goldstein compares them to a Venn diagram, explaining, "There's an overlap between those two concepts. But not everything that's cryptocurrency-related is blockchain-related. And there are a lot of things that are blockchain-related that have nothing to do with cryptocurrency." Take banking compliance and securities, for example — two areas that crypto attorneys have to be up on, but blockchain lawyers might not touch.

Of course, staff can always learn new lingo. Goldstein says local tech Meetup groups are great for self-education and meeting prospective clients. But if a core set of employees isn't tech-savvy enough to already understand the basics, that's a major red flag.



Fortunately, from a legal perspective, many firms already have the skills the new practice areas would take. The United States doesn't have blockchain- or crypto-specific laws, Goldstein says; there are just new challenges in "taking the existing regulations and trying to fit them around a new technology." That means staff working in certain areas should already have some transferable skills. Fintech — or financial technology — attorneys, for example, know the compliance laws required to work in crypto. And hospital and pharmaceutical clients need help with data exchange and trusted intermediaries, so health-care regulatory lawyers already have the knowledge they need for blockchain.

Fortunately, from a legal perspective, many firms already have the skills the new practice areas would take.

WHAT FIRMS NEED

Of course, legal know-how is only half the battle. Administrators have to think high-tech. Goldstein says clients in this field "not surprisingly, tend to be very technically adept. They would get very quickly frustrated with a law firm that didn't have cutting-edge or at least a pretty sophisticated understanding of the more high-tech solutions."

Firms don't have to be virtual law offices (VLO), but they do need to use the same business software that startups embrace. For discovery and other file transfer, this means file-sharing platforms like Google Drive. Consider swapping out email for secure communication apps such as Signal. And if your firm still requires clients physically sign their engagement letters, watch out: In tech, paper is passé. Use an electronic signature tool like DocuSign or Adobe Sign instead. Again, secretaries and staff don't have to be VLO-level savvy, but they can't be Luddites either.

Firms also need to be prepared to accept payment in Bitcoin, a popular cryptocurrency introduced in 2009. When clients make their money buying and trading a certain currency, they of course want to pay in it and, according to Goldstein, those who can't will take their business elsewhere. For Cogent's

Unlike other areas of law where top attorneys dominate the field with decades of experience, crypto and blockchain are both still new enough that it's easy for firms to become competitive very quickly.

administrator, he adds, setting this up was actually the hardest part of adding the firm's new practice. "The setup might seem straightforward," he says, but is "actually fairly complex." For starters, the bookkeeper (or someone who works with her) needs to know how to use crypto wallets — the technology required to accept, store and trade cryptocurrencies. Then you have to make sure the vendor you choose is compliant with "know your customer anti-money laundering" (KYCAML) laws.

"There's a fair amount of complexity and paperwork just to get yourself signed up for service like that," he notes, noting that Cogent was "fortunate that we had a really very smart, detail-oriented administrator" — one patient enough to "take the time to figure that out." If your firm doesn't have that go-to employee with the time and technical skill to research wallets, crypto is not for you.

Outside of this, though, Goldstein says adding the new practices didn't really create a lot of work for staff. "If you're already servicing high-tech clients, you're probably well positioned," he advises, noting attorneys who have founded their own startups, served as in-house counsel, or worked in patent or intellectual property law tend to be a good fit.

Above all, Goldstein says the most important trait staff need is perception. "It's critical that you understand your clients'

business model, how they make money, what their unique challenges to that business sector are, and it really helps if you have a good grasp of the technology and how the technology works." When you do, existing clients may come to you, asking for blockchain or crypto work. That's how Cogent's new practice started: a high-tech client needed help with setting up a cryptocurrency hedge fund.

"Anytime you've got a new emerging technology, there's a good opportunity," says Goldstein. Unlike other areas of law where top attorneys dominate the field with decades of experience, crypto and blockchain are both still new enough that it's easy for firms to become competitive very quickly. "It's definitely not too late," Goldstein adds. "We're still very early in the development of both sectors." ■

ABOUT THE AUTHOR

Terena Bell is an independent journalist reporting on tech, translation, attention-deficit disorder, sex and books for *Legal Management*, *The Atlantic*, *The Guardian*, *Playboy* and others.

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EILEEN WHITAKER
*Senior Learning & Change
Management Consultant,
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“

A learning program is valuable when it drives performance, solves a problem, increases adoption or increases efficiency.”

Measure What Matters

“Not everything that counts can be counted, and not everything that can be counted counts.” — Albert Einstein

What is the value of your learning programs? I’m talking about onboarding, security awareness, technology training, professional development — all of it.

When I pose this question, I’m typically met with blank stares, or I am told the number of attendees in classes or the quantity of classes offered. But what is the value? While anecdotal stats provide important insight, metrics that measure butts in seats don’t necessarily indicate value. Peter Drucker, founder of modern management, said, “What gets measured, gets managed.” Given this truth, it is essential that we are intentional and plan what gets measured, ensuring we’re measuring what matters.

I invite you to consider four key assumptions when setting expectations for your learning programs and defining value — Purpose, Data, Quality and Effort:

PURPOSE: Learning programs should enable learners to maximize performance, not give trainers another course to deliver.

DATA: Make decisions based on data. Evaluations help maximize value and encourage continuous improvement. Without data, the effect and value of decisions cannot be measured.

QUALITY: Quality is defined by the customer — lawyers and staff. How well you meet their expectations determines success.

EFFORT: To deliver value, action is required. Learning is not a spectator sport.

When it comes to measuring learning effectiveness, two common challenges are shared by training teams: 1) the inability to get their hands on the data and 2) the fact that measuring is time-consuming. Yes, effort is required, and you may have to consider new strategies to obtain the data you need, but the most successful organizations measure.

The traditional framework of learning programs tends to be “develop and deliver.” By broadening the focus and shifting efforts toward building awareness, increasing engagement, developing solutions, using engaging delivery techniques, and reinforcing with strategies that transfer learning to the job, continuous learning can play a larger role in the business of law.

It is also essential that you can articulate the value of your programs. Value is not the number of people trained or who watched the e-learning. It's not necessarily assessment scores either — unless connected to a business benefit. A learning program is valuable when it drives performance, solves a problem, increases adoption or increases efficiency.

Here are some tips to get you going on the right path.

Measure what matters to the firm. Know your firm's business drivers and values. Identify how your learning programs align with the firm's vision and values. Having clarity on what matters to the firm, and aligning your programs to those drivers, will determine what should be measured. You can't measure what matters until you know what matters.

Use proven techniques to evaluate learning program effectiveness. Kirkpatrick's Four Levels of Evaluation and the use of key performance indicators (KPIs) are a proven standard in learning. The four levels are:

- **Level 1, Reaction:** To what degree did participants react favorably to the learning event?
- **Level 2, Learning:** To what degree did participants acquire the intended knowledge, skills and attitudes based on their participation in the learning event?
- **Level 3, Behavior:** To what degree are participants applying what they learned to the job?
- **Level 4, Results:**
To what degree are targeted outcomes occurring, as a result of the learning event(s) and subsequent reinforcement?

Focus first on Level 4, using a top-down approach to define the desired business results of each facet of the program, and state your goals in a measurable manner. Use the Four Levels of Evaluation as a framework for measurement and KPIs to help

determine progress toward set goals. KPIs for projects might include finishing on time, being under budget, and staying within scope. For a helpdesk, it might be length of talk time, speed to answer and first call resolution.

With learning programs, effectiveness might look different depending on the type of program and could warrant varying KPIs for each. Some common KPIs for measuring learning quality include user adoption, calls to helpdesk, customer satisfaction, time to competence, training cost per employee, compliance training hours per full-time employee (FTE), percentage of audit plan completed, document health, return on investment (ROI), and return on expectation (ROE).

Measuring is not "one and done." After you identify your key performance indicators, establish a benchmark or baseline measurement. Then consider the appropriate time interval to repeat the measurement so you can indicate progress and/or know when you've met the goal. It's important to socialize program goals, as you'll likely need assistance and support from many lateral teams to help capture relevant data.

Transform your learning programs from those made for "develop and deliver" to those that drive performance, solve a problem, increase adoption or increase efficiency. Accomplish this by establishing metrics that matter. First, know what brings value to the firm, align your learning programs to the business, and set measurable goals using the Four Levels of Evaluation. Next, establish KPIs for each learning program, determine the benchmark, and set a cadence for continued measurement. Finally, socialize your goals and measurement plans with stakeholders and lateral teams as you seek the assistance and support from the helpdesk, library staff, security team and staff supervisors.

Don't rely on speculation. Instead, confidently measure what matters and allow the data to tell the story. ■

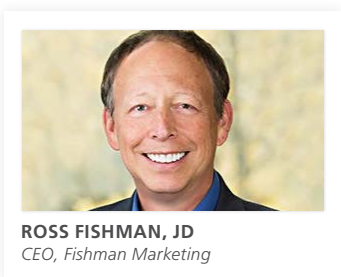
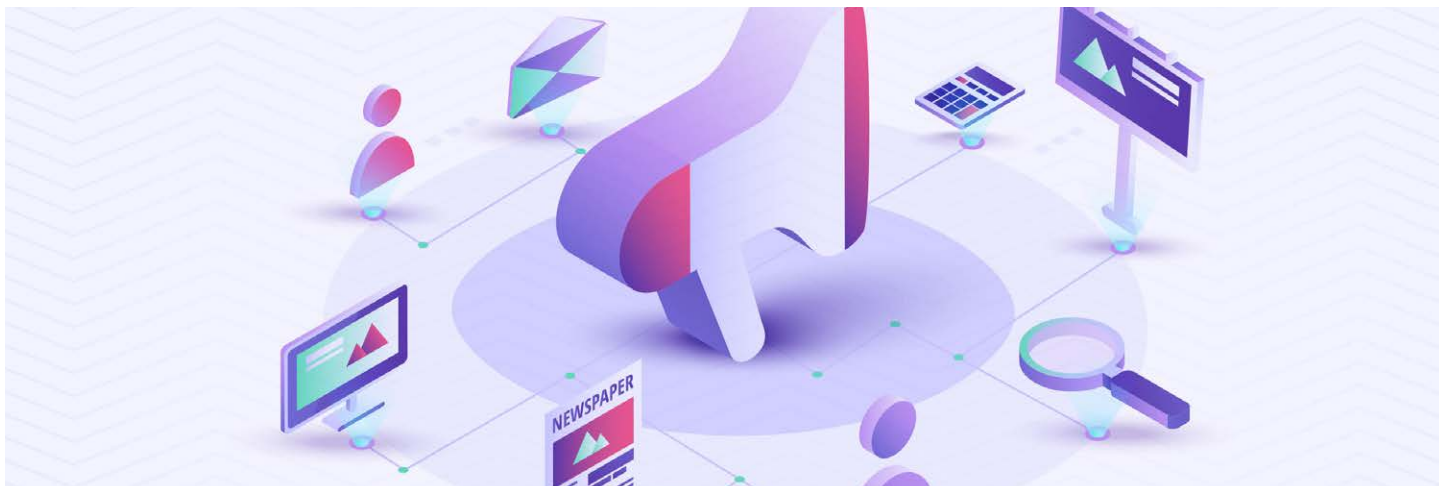
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Eileen Whitaker is a Senior Learning & Change Management Consultant at Traveling Coaches. She partners with law firm stakeholders and learning professionals to develop strategies that maximize user adoption of technology-related business initiatives. She specializes in strategic learning approaches and professional development communications, educating firm stakeholders on the need for data security and driving legal professionals toward behavioral change. Whitaker is a certified Change Management Practitioner and winner of the ILTA Distinguished Peer Award for Innovative Consultant of the Year in 2016 and 2018.

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**MEASURE WHAT MATTERS:
A DEEPER DIVE**

If you position yourself as a strategic business partner to the firm, you won't want to miss this interactive and highly engaging session at ALA's Annual Conference & Expo in Grapevine, Texas. Eileen Whitaker will expand on the information in this column and discuss how to establish metrics that matter. Register today alanet.org/ac19!



ROSS FISHMAN, JD
CEO, Fishman Marketing

How to Collect Marketing Info Inside Your Firm

[A sample memo you may circulate is below.]

It can be hard to collect marketing data inside a law firm. People are busy, they're billing hourly and when they win a case, finish a deal or close a file, their first thought isn't always "Hey, I'd better tell marketing!" But, of course, we really want them to. We can use this information to update our website; draft newsletters, press releases and blogs; and create other important collateral materials and social media content. Commentators regularly proclaim that Content Is King, but they fail to explain how to systematically squeeze that information out of your lawyers' heads.

It can help to create some internal "Wait, what about *my* win?" competitiveness among the lawyers. Most of the news will tend to be supplied by a small group of aggressive self-promoters, so you may want to regulate the flow of their material to help protect them from themselves.

You'll need to nudge them. Below is a memo I like to occasionally circulate among the lawyers and paralegals to encourage and remind them to keep marketing updated. Feel free to use it, if it'd help.

MEMORANDUM

TO:

FROM:

DATE:

RE: Increasing Our Internal Communication

It is important to maintain a steady flow of information throughout the firm — to be aware of what we're all doing — to help market our firm and sell one another's services. More

“

We can use this information to update our website; draft newsletters, press releases and blogs; and create other important collateral materials and social media content.”

communication leads to stronger links among the different lawyers and across practice areas, resulting in a healthier firm and more opportunities to expand our client relationships. We would like to regularly report on new clients, success stories, unusual representations, new hires and the firm's ongoing marketing activities.

This is to request that you bring to our attention the cases, transactions, matters and representations that can help keep us all informed about your activities.

Further, we would like to enhance the firm's external image and increase our firm's name recognition in the minds of the



general legal and business public. To make the most effective use of the media, we must feed them information as quickly as possible while it is still newsworthy. By informing us of a probable significant event before it occurs, we can have our resources ready to move when the news breaks.

When you are approaching a crucial point in a case or matter, or receive a favorable result of any type, *call [NAME] at extension [XXXX]*. We can easily handle client sensitivities and confidentiality issues, but we cannot freshen a stale story.

Examples of this information include:

- **Our filing, or our being hired to defend against, significant litigation**
- **A litigation victory** by verdict, motion, appeal or settlement
- The beginning or end of either **a large deal or one with well-known names**
- **A significant new client or representation** that can be disclosed
- **Something with unique interest** to the firm, general public or the business/legal communities, even if it is a small matter
- **An award or appointment**

Your cooperation is appreciated! ■

ABOUT THE AUTHOR

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

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Why Combo Life Insurance/Long-Term Care Products Might Be the Best Option for Your Employees

By Robyn Leonard



One of my dear friends is a lawyer. We often get together socially, and because I work in an industry that helps companies plan for their employees' future long-term care needs, the conversation eventually ends up gravitating there. My friend questions the idea of paying premiums for a policy she may never use and could possibly afford to pay out of pocket for when the time comes.

I always encourage her to weigh the realities of care and consider how she would pay for it. Long-term care (LTC) comes into play when we need assistance with activities of daily living. Think of the things you do each morning — getting up, bathing, getting dressed, eating, etc. Research says that 70 percent of us will need long-term care at some point in our lives due to the natural aging process, illness or accident.

And LTC can be a heavy financial burden. Costs for long-term care currently ranges between \$40,000 and \$150,000

annually for care in a nursing home, in an assisted living facility or at home, depending on where you live. If you multiply that number by the average stay or care period of three years, you can see how a significant amount of money is needed to pay for long-term care needs.

Surveys show that people spend more time planning their annual vacation each year than planning for their retirement, and LTC planning is no exception. People don't want to think about needing LTC, especially if they feel young and healthy. But a little planning now can avert the disaster that an LTC event can wreak on your employees' financial portfolios.

LTC plans ease the burden on your employees' family members. It allows their family members to be more involved in decision-making, not caretaking. It also alleviates the stress of coming up with the funds to pay for care.

So it really does make sense to look at a solution to pay for your future long-term care needs if you don't already have a plan in place. There are different types of long-term care solutions, and they all have their own benefits and considerations:

- **Traditional or standalone long-term care plans** pay out if a LTC need arises. These policies are rich in benefit offerings. They also often have medical underwriting requirements in place to qualify for coverage. If you are young and healthy, this may be the plan that is right for you.
- **Life insurance policies with long-term care riders**, often referred to as combo or hybrid products, are another way to plan for potential LTC needs. These group combo products can offer guarantee issue; no health questions are asked at the time of application. These products give the policy holder access to the death benefit if long-term care is not needed.

Research says that 70 percent of us will need long-term care at some point in our lives due to the natural aging process, illness or accident. ... Costs for long-term care currently ranges between \$40,000 and \$150,000 annually.





The largest difference between these policy types is the combo product's guaranteed payout. Most people (like my friend) are concerned about not using long-term care they've already paid for. The combo product either provides the policy holder with benefits for a LTC need or provides beneficiaries with a death benefit. This combo product is not meant to replace any existing life insurance policies; rather, it is an LTC planning solution that has a guaranteed payout if you never need the LTC benefits.

The bottom line is that almost everyone should pause to think about how they would handle a long-term care event for themselves or a loved one. From there, recognize that the types of insurance coverages vary, so it's imperative to educate yourself and your employees on this important aspect of a sound financial planning portfolio. As I've told my friend, a thorough portfolio should include some sort of plan to pay for potential long-term care needs. ■

ABOUT THE AUTHOR



Robyn Leonard is a Benefit Adviser and Account Executive at LTC Solutions, Inc. She educates employers and brokers about long-term care and solutions that are available to them in the marketplace. Working in the long-term care industry for more than 25 years, Leonard has worked in an long-term care facility and on the carrier and broker side of the business.

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Transform Billing Processes to Improve Your Firm's Bottom Line

By Kevin Harris



Lawyers and legal staffers are under enormous pressure to bill time, complete matters and justify their work to clients who may question their invoice details. Unfortunately, many hours of quality legal work can be improperly devalued or discounted at the point of billing. And a slow bill generation process can cost the firm money far beyond its allotted overhead.

The typical law firm's billing department collects billing timesheets with narrative details, generates prebills, collects lawyers' edits to the prebills, issues invoices to clients and collects payment. There are many potential stumbling blocks that can hobble this process, but many can be handily addressed by streamlining billing workflow, instilling training measures and harnessing the benefits of technological solutions.

Consider these five strategies to build billing efficiency and accelerate the dollars coming into your firm:

1. STREAMLINE BILLING

Billing is what keeps the firm going, so its efficiency is crucial to the firm's success. Analyze your firm's billing workflow, from lawyers entering their time through the prebilling process to sending out final invoices. Draw it out flowchart-style if a visual representation helps. Show how information is routed within the organization and how long information "sits" or "waits" at each stage. It's likely that you'll quickly start to see where the delays occur.

Paper-based processes are a main culprit in slowing down a law firm's billing. Orion Law Management Systems recently conducted a survey* showing that more than 71 percent of law firm accounting/billing departments were still printing out and circulating paper prebills (invoice drafts), which were then sometimes lost or misplaced. Eighty-two percent of respondents said lawyers marked up their prebills with handwritten notes that were frequently illegible. Outdated processes like this unnecessarily lengthen the billing process, causing firms to send bills out later and therefore delaying collection of funds. Eliminating outdated paper-based processes and offering electronic alternatives can help improve efficiency.

2. GIVE TIMEKEEPING A TUNE-UP

Lawyers and legal staff members don't like tracking their time — that's a given — and, as a result, many leave it to the last minute. When time is not tracked at the same time the work is done, it leads to lackluster timekeeping results that are not accurate or easily defensible. With that in mind, law firms should make it as easy as possible for legal professionals to submit accurate time reports. One way to do so is by providing assistive technology tools, such as new artificial intelligence and machine learning tools that contemporaneously capture time spent on documents, emails and phone or video conferences. Firms that invest in electronic time-capture tools will

Outdated processes like [paper prebills] unnecessarily lengthen the billing process, causing firms to send bills out later and therefore delaying collection of funds.

improve timekeeping accuracy and boost morale among lawyers, paralegals and legal assistants.

3. MAKE INVOICES CLEARER FOR CLIENTS

For many law firms, invoices are a critical instrument of client communication. If an invoice is confusing, poorly formatted or vague, clients find it difficult to understand the value of the services rendered. Listen to feedback from clients about what frustrates them about the invoices they are receiving, and make modifications when possible. Clients are never happy to part with money, but at least you can make them feel heard about how their bills are presented. By tailoring your invoices, you help clients understand the fees being charged and reinforce their loyalty to the firm, too.

4. BUDGET FOR AND RED-FLAG WRITE-DOWNS

Due to their learning curve, new attorneys inevitably spend more time working on projects than more experienced lawyers. However, clients sometimes balk at paying for the extra time junior lawyers require to complete tasks. Firms should establish and enforce matter-based budgets that alert the billing attorney and firm management of potentially excessive amounts of time spent by junior attorneys. This time overage may ultimately have to be written down, or reduced to a more agreeable figure. Once a certain threshold for write-downs is crossed, the account should be red-flagged for detailed partner review. In fact, it's advisable to develop and enforce a firmwide policy governing write-downs of unbilled time.

5. TRAIN NEW EMPLOYEES ON DISCOUNTING

As part of the firm's onboarding process, all timekeepers joining the firm, including junior attorneys, lateral hires and partners, should be trained on timesheet discounting policies. Clarifying these procedures from the outset will mean fewer mistakes in timekeeping and fewer accounting/billing assets expended to fix those errors. Use periodic webinar or video training to help long-term firm employees brush up on the policies.



Your firm's billing process is already functional — otherwise it wouldn't be staying in business. However, by making the modifications listed above, the billing process can bring more money into the firm faster while improving the experience for your employees and clients. By improving timekeeping, removing billing obstacles, presenting clear invoices, training people appropriately and guarding against extreme write-downs, your firm can maintain both a good bottom line and strong client relationships. ■

**To view this survey, visit the web version of this article.*

ABOUT THE AUTHOR



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What's Happening at Headquarters?



VOTING MEMBERS APPROVE BYLAWS AMENDMENT

In January, the ALA Board of Directors unanimously approved a proposed bylaw amendment to change the organization's governance structure. Because the bylaws stipulate that amendments may be adopted by a majority vote of the voting members casting ballots, Regular Members voted on the measure in February.

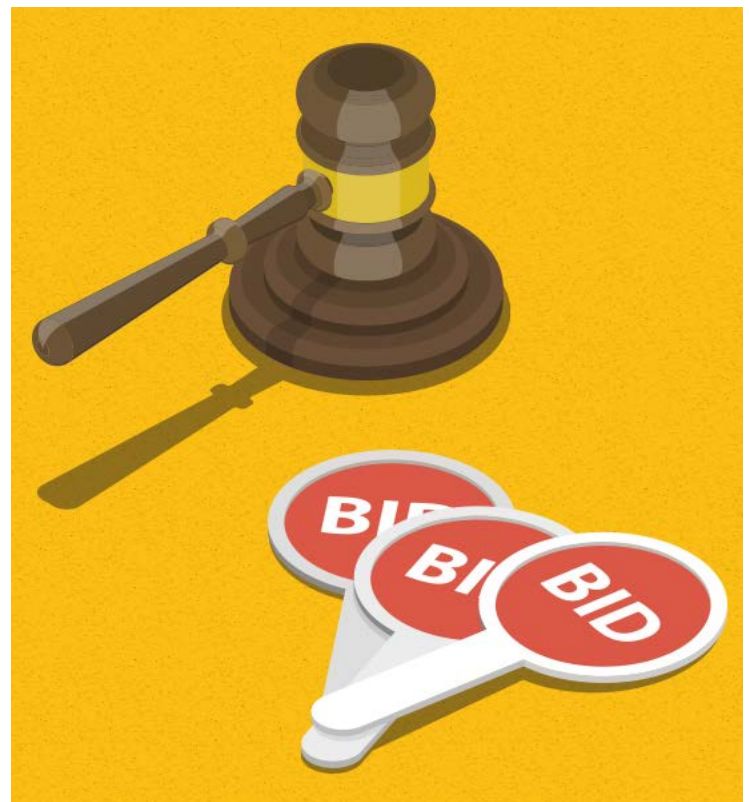
The vote resulted in 582 approved and 54 opposed. Nearly 8 percent of Regular Members cast a vote, and of those, 93 percent were in favor of the proposed amendment. The new bylaws can now be found on the ALA website. (Visit the web version of this article for the direct link.) In the coming months, ALA headquarters staff will be working to update all references and resources to reflect the new governance structure.

DONATE TO THE SILENT AUCTION

The Silent Auction is again coming to the 2019 Annual Conference & Expo, and as the primary fundraiser for the Foundation of the Association of Legal Administrators, it needs your donations! If you or your chapter would like to donate an item, please visit the Silent Auction site (alanet.org/auction) and scroll to the *Donate an Item Now* button to fill out information about your donation. Then ship your item before March 25 to:

ALA Headquarters
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You don't have to attend the conference to donate an item — or to bid on one or more. All the bidding takes place online from Monday, April 8, to Wednesday, April 17.



CRUCIAL EDUCATION, ALL IN ONE PLACE

ALA's new Legal Management Resource Hub are taking shape. We've already released the hubs for Financial Management and Human Resources; you can expect hubs for the C-Suite and Law Firm Management Essentials. Each hub contains newly released recordings of education sessions from the 2018 Annual Conference & Expo (free for those who attended), as well as links to recent relevant webinars, e-learning courses, *Legal Management* articles, *Legal Management Talk* podcast episodes and more. Use the hubs as your go-to source for focused education.

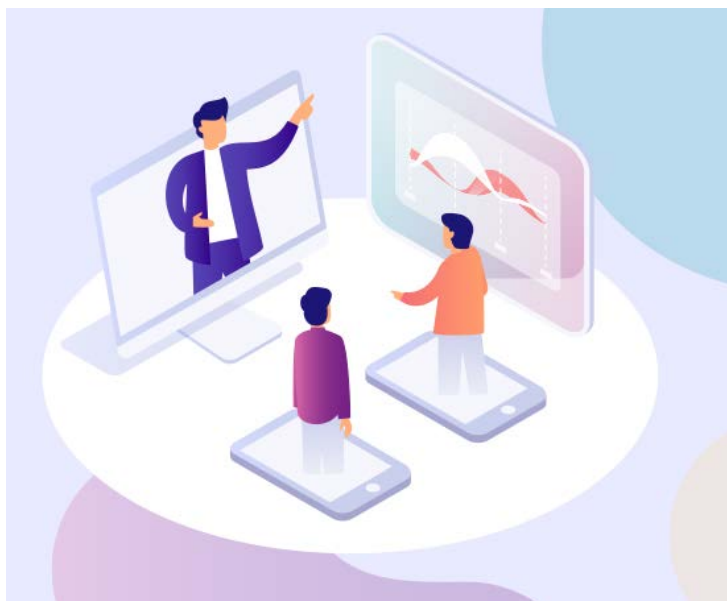
Check out the Resource Hub at alanet.org/resource-hub.



TALKING INFORMATION ASSETS WITH THE SUMMIT SERIES

Late last year, ALA debuted the Summit Series webcasts with three sessions featuring conversations between legal industry thought leaders. Free for members, they're now available to watch on-demand. The next round of complimentary webcasts will be broadcast this month.

This time, James Price, Founder and Managing Director of Experience Matters, and Nina Evans, Associate Head of the School of Information Technology and Mathematical Science at the University of South Australia, will talk about the drivers for good information asset management. The webcasts center around risk mitigation (March 8), business performance (March 15) and ethics (March 22). Register now at alanet.org/summit!



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"I try to volunteer as a session manager at any conference I attend," says Stephen C. Wolf, CLM, CPA, of Deutsch Kerrigan, LLP. "ALA always needs people to run the meetings and anyone can be a session manager. I have also made lasting friendships with some of our speakers in the process. It's a great way to help out."

Visit alanet.org/ac2019-volunteers to sign up.