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MENTAL HEALTH MATTERS

Many firms are rife with stress. Ignoring the problem puts your employees and your firm at risk.





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

You Responded; We Listened

I am writing this column early on the morning of November 6, 2018 — election day in the United States, a day when millions will cast ballots for candidates and issues that will have significant impacts on the direction of the country. It's also a day when journalists will be parsing reams of polling data to provide a deeper understanding of who voted and why. Those insights help us better understand what's important to voters and play a critical role in shaping policy.

ALA has done its own polling recently, and the results of the biannual Member Needs Assessment Survey are in! We received a total of 1,084 responses for the United States and international surveys combined. Thanks to all of you who took the time to share your thoughts with us.

Some interesting highlights identified include:

- 87 percent of respondents say that employers find ALA provides value to their legal organizations with nearly 60 percent reporting ALA provides “good” or “excellent” value.
- 60 percent of respondents indicate their employer receives greater than \$400 — roughly the cost of dues — in equivalent value through their membership.
- We saw a big bump in our “net promoter score,” from 53 in 2016 to 70 in 2018. The score measures member loyalty. It is measured by asking respondents how likely they are to recommend ALA to a friend or colleague. A score of more than 50 is considered “excellent” and above 70 is “world class.”
- The top three answers in descending order to the question, “Being a member of ALA...” were:
 1. Provides multifaceted networking opportunities.
 2. Provides me with the professional association to represent my vocation in the legal management industry.
 3. Provides relevant and useful educational opportunities.

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These new education experiences are all about unique content and providing it at a lower price point and shorter event duration.”

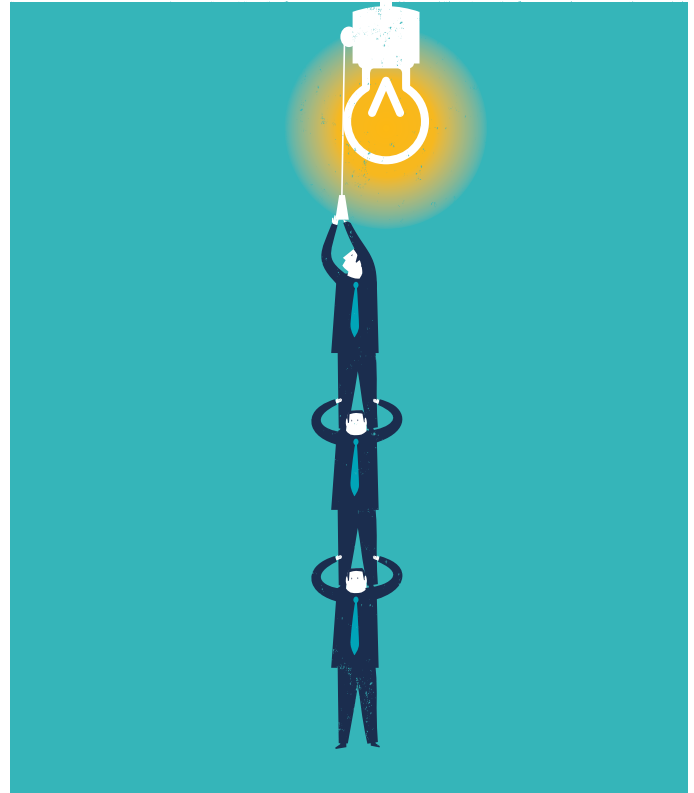
We also asked several open-ended questions regarding the challenges you face in your roles, the skills you need to be successful, and the types of educational opportunities you'd like to see more of from ALA. Not surprisingly, one of the most frequently mentioned challenges was time management, along with people and change management, process improvement, profitability, technology and understanding trends in the legal industry. To get help in meeting these challenges, our members rely heavily on the ALA network, an invaluable community of experts.

Among the skills respondents wanted help with were leadership development, financial analysis, future planning, strategy, human resources and operations. Among the areas noted where ALA can provide more education and content were roundtables to find solutions to problems, deeper dives on complex issues, handling emerging issues, the future of law firms, performance improvement, strategy and process improvement.

ALA will use the results of the survey in a variety of ways. The Board, committees and staff will use the information in shaping the strategic direction of the organization, improving the value of our programs and services, and enhancing the member experience. As you know, Goal One of our strategic plan is to "Define Our Identity" and this research will be critical in establishing and delivering on our brand promise.

In fact, we are already putting these results to use. We are excited to announce two all new in-person event experiences. These new education experiences are all about unique content and providing it at a lower price point and shorter event duration.

C4: The Legal Industry Conference is one-of-a-kind. It is all about the legal management industry and using design thinking to connect, collaborate and create change to meet the challenges facing the legal industry. The content is focused on finance, technology and marketing, as well as solutions for the industry, law firms and law departments. The program will last one-and-a-half days, and design thinking will be employed throughout. Going forward, this annual design lab will bring together representatives from all sectors of the legal industry — clients, lawyers, legal management professionals, legal technologists, business development and marketing experts, and others to collaboratively develop solutions to legal industry challenges. The program will be highly interactive and will focus on specific industry challenges. Cross-functional teams will be established to develop prototypes to address



specific challenges in the business of law. Topics may include cybersecurity, diversity and inclusion, business development, operational efficiency, and succession planning. C4 is scheduled for launch September in 2019.

The second program is a **leadership-focused conference** that is all about **YOU** and **YOUR** professional growth. A deep dive into critical personal leadership skills vital to an attendee's career such as establishing a boardroom presence, handling conflict, difficult conversations and more. This conference is also a day-and-a-half and will focus on one (or two) high-level leadership/management skills essential for success in today's legal market. The content will be led by well-recognized subject matter experts — consultants, graduate school professors, authors, etc. Sessions will combine prelab exercises, lecture, group discussion and collaboration, case studies, post-lab exercises and other adult learning concepts. The leadership conference is planned for October 2019.

Look for more details about these two exciting new offerings in the weeks ahead. We look forward to seeing all of you there! ■



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ERIC WANGLER
President, BigHand

“

Many respondents admitted they determine how busy their back-office staff is by walking the floors and seeing how busy people look.”

The Operational Blind Spot: Making Improvements in Back-Office Administration

In today's competitive legal market, law firms are under increasing pressure from all sides to control costs and boost efficiency while continuing to provide superior legal services. More and more, clients are taking work in-house, and as the legal industry evolves, the increasing number of alternative service providers is putting more pressure on law firms to streamline their internal operations and become more efficient. A challenge exists in balancing a desire to control costs with a need to provide enhanced customer service to retain existing clients and gain new clients for the firm.

UNCOVERING THE OPERATIONAL BLIND SPOT IN BACK-OFFICE OPERATIONS

Recently, BigHand commissioned a survey from legal consultants Altman Weil to better understand how law firms are currently managing their back-office operations. A survey was completed by law firm operations executives, including chief operating officers, chief financial officers, chief human resources officers, executive directors and legal administrators in 45 law firms ranging in size from 100 to 3,500 attorneys.

The results exposed a serious disconnect between the desire to improve back-office efficiency and knowing how to do it. On a scale of 1 to 10, with 10 being the highest priority, the firms ranked improving productivity, efficiency and cost savings among support staff an 8. There is a clear consensus among law firms that they need to optimize their back-office operations and a real intention to implement change in the near future.

Despite the high priority, when asked if they were confident they had the data necessary to be sure work is being delegated away from attorneys to the appropriate administrative support staff, their confidence was only 3.8 out of 10. Their confidence was even lower on

whether the right support people were doing the right work (3.6 out of 10). The survey included an interview portion for a subset of respondents, which helped shed more light on how firms are making their operational decisions. Many respondents admitted they determine how busy their back-office staff is by walking the floors and seeing how busy people look. One firm even said that if their secretaries are on the verge of tears, the firm knows they are too busy. These observations are highly subjective, and do not give an accurate view of whether staff are truly busy, and if they are busy, if they are busy with the right work.

We call this the operational blind spot, and it is a real problem. Firms are unprepared to address the increasing pressures they are facing, because they are making decisions without good data to base them on. Absent factual data, firms either make bad decisions — or perhaps worse — no decision at all!

Given the high priority placed on improving back-office efficiency, the operational blind spot is a problem worth addressing. Firms need to make effective changes to back-office operations based on facts. Implementing workflow technology is a growing trend in law firms that are serious about improving back-office efficiency and gaining the information needed to continuously improve operations and remain competitive in a rapidly changing industry.

THE BENEFITS OF WORKFLOW TECHNOLOGY

Back-office costs are one of the top expenses in law firms. With the increase of fixed and alternative fee arrangements, firms getting their staffing model correct is taking on new importance. Getting the right work to the right people at the right cost is paramount. The question is not just whether your staff are busy — it is what they are busy with and does that make sense? With a proper workflow system, you can improve back-office operations and meet market pressure to be more efficient while providing superior service.

The best way to tackle the problem of inefficiency in back-office operations is to attack it from the front end with a seamless, intuitive task delegation and management system. Current processes at most law firms are not set up for this. Most firms are using a shared inbox system for task delegation, which provides no quantification of work in the queue and has no reporting capability.

The right workflow solution will handle all aspects of task delegation and management and should have an intuitive user

interface to ensure attorneys and support staff embrace and quickly adopt the technology. By using simple forms configured to capture the relevant information and requirements up front, tasks are routed automatically to the person or team best equipped to handle it with the information they need to complete it accurately. Sharing work among staff, across teams, offices and time zones becomes simple. The ability to accurately track service-level agreements and seamlessly manage work assigned to outside service providers becomes easier.

Once tasks are properly routed, the workflow system will capture analytics to support data-driven decision making on the back end. Of course, it is important to understand your work on the micro level — do you have enough staff to get the work done today based on the total work in the system and the required deadlines? But optimizing back-office operations also requires a system that reports on the macro level. Who is delegating the work and what kind of work is it? Who is the work assigned to, and are they the best person or team to manage that task? Is the work being managed efficiently, or would it be better directed to a centralized team? Which teams are busy, and which have capacity to take on more?

Placing your workflow and delegation process into a proper system is critical to tracking trends and managing your operations more efficiently. Whether your firm has already started implementing changes or has not yet begun a process, having data on which to base decisions is the most effective way to ensure that those decisions will have a real impact on back-office efficiency. The most progressive firms are finding ways to eliminate the operational blind spot through workflow technology that improves processes and provides actionable information. ■

ABOUT THE AUTHORS

Eric Wangler is President of the North American business unit for BigHand, a legal technology company specializing in products that maximize attorney and support staff efficiency in law firms. With more than 20 years of experience in the legal industry, Wangler previously served as Vice President of Ricoh's legal vertical segment, and has overseen the BigHand North America division for more than five years.



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MICHELLE SILVERTHORN
Founder and CEO, Inclusion Nation

Removing the Mask: Wearing Our True Identities Builds an Inclusive Culture

“

We need to actively create environments where people can be their authentic selves ... Honesty. Truth. Authenticity. What do you get in return? Engagement. Belonging. Loyalty. Joy. Success.”

A few months ago, I spoke on a panel to a group of diverse students about what to expect after graduation. After a fairly intense hour where we talked about diversity in the workplace, one of the students held up her hand. In a very frustrated tone, she asked, “How much longer do I need to do this?” The panelists and I looked at each other in confusion. “Do what?” I asked. “Wear a mask in the workplace. Pretend to be someone I’m not. I want to be me. Why can’t I do that?”

When I tell people why I started my new diversity consulting firm, I tell them about that conversation. Because that conversation is the heart of what we need to do to move forward on diversity and inclusion in the workplace.

Many employees, particularly minority and women employees, come to work wearing a “mask” to hide their authentic selves in an effort to belong. They don’t talk about their children. They don’t talk about their ethnic identities. They don’t talk about their same sex partners. They don’t talk about their disabilities. They don’t talk about their authentic selves. They silence their identities in the workplace, until the only image that others see of them is one of assimilation, of sameness, of masking — one that they work very hard to project. It’s what I call the “Kevin from Yale” dilemma.

KEVIN FROM YALE DILEMMA

Who’s Kevin from Yale? I once had a conversation with a white friend who said, “I’d rather be black in this country than white.” My mouth dropped open. “Listen, listen,” he explained in a hurry while I struggled to figure out where to start. “No, no, no. I want to be him.” And that him is “Kevin from Yale.”

Kevin from Yale is the reason many still believe we live in a post-racial society, because if Kevin from Yale made it, everyone can. Kevin from Yale is the successful black man who is valedictorian. Class president. Graduated first in his class. Now he's company vice president. He gets along with everyone. He doesn't have any of those old hang-ups about race. He can hang with anyone. It's so easy for Kevin from Yale.

Kevin from Yale is probably a very nice guy. But do you know what he feels like when he walks into an office where he's the only black person there? Do you know what he feels like when he walks into a meeting and knows that he has to represent every black male professional out there, because it may be that no one else in that room will meet one? Kevin from Yale is everyone's one black friend. Do you know the psychological toll it takes on Kevin from Yale, to be Kevin from Yale? To have been Kevin from Yale his entire professional life, and to have never been anything else except Kevin from Yale? Because to wobble for even a second on that tight rope he is walking on is to have someone turn to him and think, explicitly or implicitly, "Oh, I guess he's just like the rest of them."

CREATE A CULTURE OF AUTHENTICITY

How do we change that? How do we turn our workplace cultures into ones that welcome authenticity and a sense of shared belonging? We need to actively create environments where people can be their authentic selves, where they can talk about being a parent, or Latina, or gay, or any crucial identity that they have, and they won't feel like they're excluded or judged.

How to do that? Start at the top. If you're a leader, open up about your life outside the organization. Set a culture of authenticity for your teams. Explain that authenticity matters during recruiting and on-boarding. Encourage upstanding,

where if someone sees something problematic, they are empowered to stand up and speak up about it. Recognize people for their accomplishments, host town halls and listening sessions, and most of all, make sure everyone is given space to share their stories — both the stories that are the majority narrative, and the ones that aren't.

For example, I grew up playing travel hockey in the Chicago suburbs. I grew up going to Indian weddings every single weekend of my life. I grew up with seven siblings and a single mom in a one-bedroom apartment. I got married to my college sweetheart, too, but had to wait until the Supreme Court legalized same sex marriage. I have three kids and it's really hard when I miss their school activities. I pray five times a day and I do that in the room right over there.

Honesty. Truth. Authenticity. What do you get in return? Engagement. Belonging. Loyalty. Joy. Success. That's the inclusive workplace I want to see. Where every Kevin from Yale can finally feel like they belong. ■

ABOUT THE AUTHORS

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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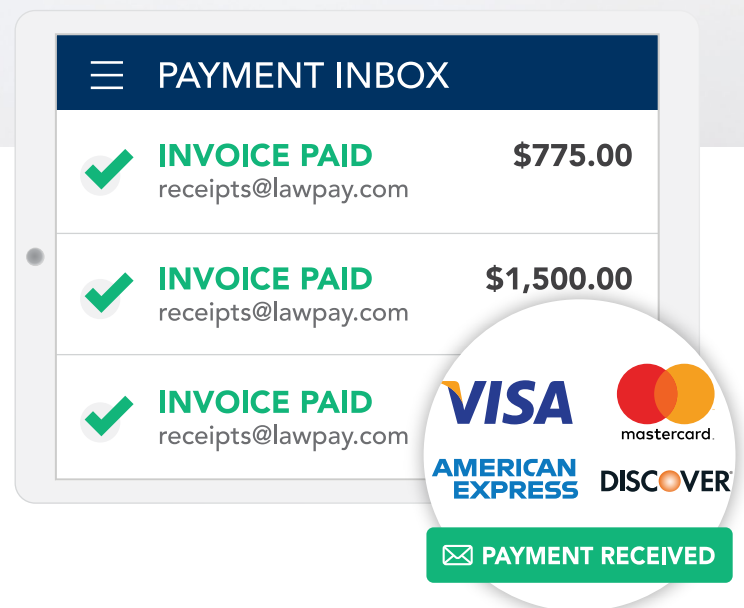
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ROSS FISHMAN, JD
CEO, Fishman Marketing

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So, what are the attributes of firms that are effectively diversifying the services that they provide to their clients?”

The Top 5 Reasons Your Law Firm Can't Cross-Sell

Many years ago, as a young marketer at a 500-lawyer firm, the managing partner tasked me with developing a firmwide cross-selling project, with the goal of institutionalizing more of our big clients. I did exhaustive research. Of course, every marketer knew that “getting business from existing clients is five times easier than getting a new client” (although I don’t know who first proclaimed that misleading platitude). I devised a step-by-step, bulletproof process in extraordinary depth and detail.

The design was, if I may say, pure genius. The gleeful managing partner agreed that it was a sure-fire winner. It was guaranteed to bring in millions of dollars of new business. He rolled out a cross-selling initiative firmwide in all offices. I planned to receive an enormous year-end bonus.

Unfortunately, of course, it turned out to be a total catastrophe.

It was a complete and utter failure, the *Hindenburg* of marketing efforts — by far the biggest disaster in my entire career. Not a single lawyer tried it, yet I was so sure this was going to be wildly successful.

I later interviewed my favorite partners to determine what went wrong. They confidentially told me that there was “no way in hell [they] were going to do any of it.” I was dumbfounded. Why not? In retrospect, it was pretty obvious. The whole program was premised on the absurd belief that the lawyers would do what was good for the firm, rather than what was in the lawyers’ personal financial interest.

I'D MADE A ROOKIE MISTAKE

There were countless issues I wasn’t experienced enough to consider: 1) The partners liked keeping their clients portable, so they could pick up their ball and leave if they wanted to move

to a different firm; 2) the compensation system didn't reward this behavior at all; 3) the firm's culture and leadership didn't demand that they put their critical client relationships in their fellow partners' hands; and 4) the partners didn't trust each other's legal skills or client service. What if the new lawyer screwed up the originating attorney's relationship? As one noted, "I'd lose control of the relationship, and risk losing the client that's putting food in my children's mouths." Another partner said, "I'd rather send the work to another firm where I can't be blamed if it gets screwed up."

Furthermore, they were doing just fine already. They were busy, and there was no penalty if they ignored the cross-selling initiative, went back to work, and maintained the status quo. And this was just the start of the objections. (There were more than a dozen other barriers, too. See the online version of this article for more details on those.)

Of course, the lawyers were right to behave as they did. At that firm, they didn't trust the firm, its management, or each other to do the right thing, so it would be unreasonable for them to even try. As long as they could control every aspect of their client relationships, they were safe. No lawyer had so many clients that they were willing to risk putting them in the hands of partners in other practice areas whom they didn't trust immensely.

THE 5 TRAITS OF SUCCESSFUL CROSS-SELLING FIRMS

So, what are the attributes of firms that are effectively diversifying the services that they provide to their clients? There are at least five primary characteristics, detailed below.

The point is, if you are confident that your firm possesses all five of these characteristics, then you just might have a shot at selling additional types of services to your existing single-practice clients. If you don't, then it's unlikely that you'll be successful over time, and I would suggest that you either 1) work to gradually change your culture to become more equitable and team-oriented, or 2) reduce your cross-selling efforts in favor of the many other marketing activities that can prove effective at all types of firms.

Firms that excel in cross-selling tend to have the following attributes:

1. Strong leadership that supports and rewards sharing.
2. A firmwide culture of trust and friendship among the partners.

3. A fair compensation system that
 - acknowledges the risk to the partner controlling the relationship, and
 - rewards the efforts of the support partners for helping bring in the new work.
4. Effective internal communications that informs everyone regarding the nature of the firm's practices and clients.
5. Marketing training that teaches the lawyers how to cross-sell.

By the way, many untrained lawyers try to sell additional practice areas via sneak attack:

Lawyer: Hi [Corporate Client], I haven't seen you in a while; let me buy you lunch!

Client: Sure, that'd be great, thanks.

Lawyer: I'm going to bring along, Tiffany, a litigator I'd like to introduce you to.

Client: [realizes he's just been tricked into agreeing to sit through a 90-minute sales pitch]: Ugh. OK, fine.

That doesn't work because 1) the client **hadn't expressed a specific need for another litigator**, and 2) the lawyer **hadn't established why Tiffany is a much better option than the skilled litigators the client already uses**.

Yes, many global companies have been streamlining their administration by seeking one-stop shopping at fewer law firms, making successful cross-selling more likely. But those firms must still compete for this work against the other international law firms where the internal barriers might be lower.

Obviously, there's much more to this complex topic. But this is a start. ■

ABOUT THE AUTHORS

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



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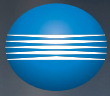
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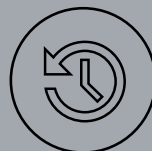
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How Delayed Retirement Can Help Your Firm

Find out how to position experienced attorneys to be the best resource.



ERIN BRERETON

Owner, Chicago Journalist Media

For some attorneys — including Daniel Riesel, Principal at New York-based Sive, Paget & Riesel P.C. — exiting the workforce at the traditional retirement age just didn't hold that much appeal.

So Riesel, who was admitted to the New York State Bar in 1961, kept working — and has no plans to depart from his current firm.

"I like to practice law," Riesel says. "My wife is a practicing attorney in a large firm that does not have a retirement age mandate; at 65, we thought we were far too young to retire, and I was in the midst of a lot of exciting cases — so I wasn't considering retirement."

At firms without a mandatory retirement age — approximately half, according to Major, Lindsey & Africa — a number of attorneys are opting to work past age 65.

Eight percent of partners with a tenure ranging from one to more than 21 years, in fact, say they don't plan to retire; a quarter aren't sure if they ever will.

Eight percent of partners with a tenure ranging from one to more than 21 years, in fact, say they don't plan to retire; a quarter aren't sure if they ever will.

OPERATIONAL ASSETS

If partners remain productive, firms are often happy to let them stay, according to Steve Nelson, a former attorney and who works as a Managing Principal at The McCormick Group, an executive search firm. There he handles the company's attorney placement operation.

"A lot of times, attorneys can retire into senior staff; they don't have to leave the firm," Nelson says. "Even firms that say they have a retirement policy, more and more are making exceptions for partners who are very busy and have a lot of client relationships."

Even if attorneys maintain the same workload and schedule past age 65, they won't necessarily delay retirement forever. Firms may want to start thinking about which lawyers would eventually be able to handle older firm members' work if they do retire.

It can be a win-win scenario for lawyers who hope to delay retirement — and for law firms, which then have experienced senior staff members on hand.

Being able to work alongside former Chief Executive Officer (CEO) Barry Mandelbaum at Roseland, New Jersey, law firm Mandelbaum Salsburg as co-CEOs helped Bill Barrett prepare to assume the role full time in January 2018.

"As we began our transition plan a few years ago, I had the luxury and advantage of having a mentor and [working with] someone who'd been practicing law for [more than] 50 years and managing the firm for a long time," Barrett says. "By him staying on, it allowed the process to happen slowly and organically, which benefitted the law firm greatly."

Mandelbaum — who, at 81 is the only attorney at the firm to remain a shareholder past 75 — currently serves as chairman of the board and maintains a robust schedule, generally working five days a week from 9:30 a.m. to 7 p.m., attending

client dinners or land-use matter events four nights a week and providing assistance in the office, as needed.

"The younger partners come to me all the time with issues they have with matters they think I know about — development, zoning, sometimes about litigation," he says. "[I give] a lot of advice to other people; I think I provide a certain amount of business and financing knowledge to help the firm in its development and growth."

STRUCTURING POST-RETIREMENT POSITIONS

If experienced partners opt to work past the traditional retirement age, they can provide considerable institutional knowledge and support.

To ensure expectations are aligned and the attorneys are positioned to succeed, firms may need to address several considerations, including:

How attorneys' roles are defined: Law firms that limit partnerships to a specific number may ask partners who don't want to completely retire, but would like to work less, to accept a different title, such as senior counsel or senior partner, to free up a partner position for a younger attorney — or, according to Andi Cullins, Principal at The McCormick Group, to indicate to clients the partner's role has changed.

"Sometimes they're using it as a way to bring somebody else up," Cullins says. "Sometimes they're using it to signal this person is still around and part of the firm, but maybe is not full-time."

Schedule and compensation changes: Mandelbaum Salsburg allows attorneys to work abbreviated hours, if they'd like to cut back.

"They can choose to remain as shareholders, or if they want to go to senior status, be paid strictly on productivity," Barrett says. "We buy their shares back so they're no longer voting partners."

If retirement-age partners decide to reduce their hours, logically, they'd help siphon a portion of their work to other firm members with ample instruction.

Even if attorneys maintain the same workload and schedule past age 65, they won't necessarily delay retirement forever. Firms may want to start thinking about which lawyers would eventually be able to handle older firm members' work if they do retire.

However, because that type of work likely won't be billable, firms may, according to Cullins, need to revisit their compensation model — potentially offering a bonus or other incentive to encourage attorneys to start to hand work off without focusing on possibly losing revenue.

"The truth is, if you're going to compensate [them] in a sufficient fashion to keep them engaged, it's probably going to mean all partners of the firm are affected," Cullins says. "It really takes the buy-in of the entire partnership to say, 'This is for the good of the firm and its longevity, and we need to start doing this, even if it means we take home a little bit less.'"

The key is for firms to recognize nonbillable work has merit — and plan for the expense, according to Bill Klein, General Counsel at 80-attorney California firm Hopkins Carley, who stepped down from a managing shareholder and president position roughly three years ago.

"Our view has been just because you were billing 1,600 hours does not mean you can't bill [a] business model that works for the firm with reduced numbers; you just have to build that into the budget," Klein says. "The structure of the new arrangement recognizes the transitional partner's commitment on an hourly basis is different — and acknowledges the firm recognizes [the person] is doing other things that have value."

Identifying successors: Even if attorneys maintain the same workload and schedule past age 65, they won't necessarily delay retirement forever. Firms may want to start thinking about which lawyers would eventually be able to handle older firm members' work if they do retire — and it may not be as simple as giving the tasks to the employees who have the most available time.

"Figure out which lawyers would be a good relationship fit with your client base," Klein says. "It might seem laborious, but it's the best thing to do to make sure there is a successful transition so clients continue to get good service."

Easing clients into the new system: In instances when an attorney has a wide birth of clients, Klein's firm has sent out a mass mailing, letting clients know the firm planned to provide a mechanism for handling files on an ongoing basis.

The firm has taken a more individualized approach when attorneys who worked in more limited practice areas stepped back, reaching out to clients individually by email, letter or phone to provide information.

Before it's time to notify anyone, Sive, Paget & Riesel, which employs more than 25 attorneys, introduces firm members who will be working on matters to clients by bringing them to meetings and other events.

"Our younger people come with us to court and to see clients; we have a lot of instances where younger people can cut their teeth on, for example, [being] before boards, town councils or various agencies, so they get a lot of experience presenting facts," Riesel says. "We don't have a formal plan, but it's built in as part of our culture that younger people stand shoulder-to-shoulder [with more experienced firm members]."

Although Riesel isn't planning to pass the bulk of his work to younger attorneys in his firm anytime soon, he says he has given some thought to the ideal retirement activity — fly fishing. While he doesn't have any sort of set timeframe to give notice, he hasn't ruled out ever doing it.

"There's going to come a time when I will be really pissed off if I'm writing briefs when I could be fishing," Riesel says. "I have no plans to retire; I find it very difficult to say you've done something exciting and enjoyable, and then you hit a certain number and walk away from it — but I have a recognition that I would probably like to sometime in the future." ■

ABOUT THE AUTHOR

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



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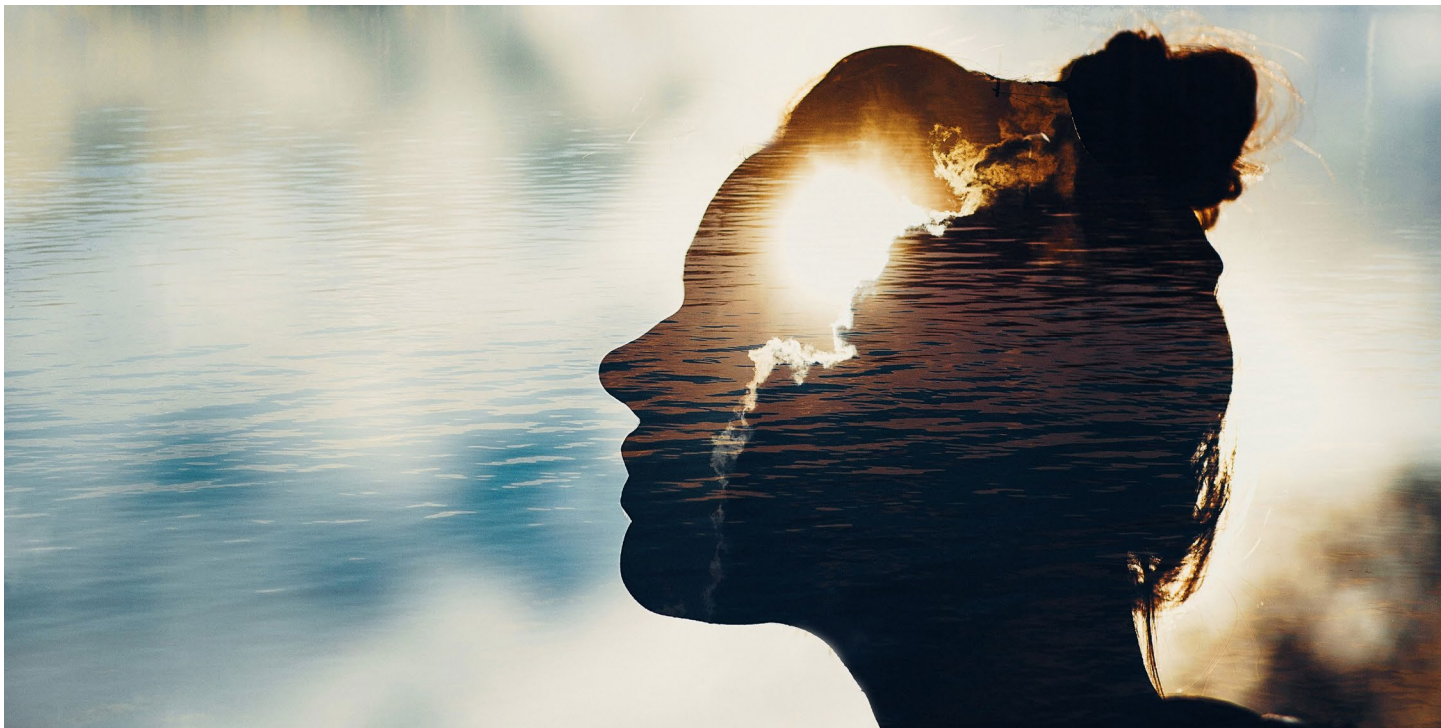
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KYLIE ORA LOBELL
Freelance Writer

Law firms are known for being demanding, stressful environments. Attorneys clock 60 to 70 hours per week, sacrificing time for themselves and their families to serve clients' needs and complete cases. They serve high-maintenance clients who command them to be on call 24/7, and do not take enough vacation time or breaks to recover. To keep up with the competition, they often have to work on multiple cases at once, as well as stay on top of the latest technology trends and best practices in the industry.

It's a lifestyle that can take its toll. A 2016 study in the *Journal of Addiction Medicine* of nearly 13,000 employed and licensed attorneys from 19 states revealed some startling information: Lawyers participate in "problematic drinking" at a rate that is 20.6 percent higher than other populations. About 28 percent of the lawyers reported suffering from severe depression, 23 percent said they were stressed and 19 percent said they had anxiety.

These findings aren't an anomaly. An ALM Intelligence survey of 200 law firms showed that half of all law firms reported that there was drug abuse occurring in their offices. A majority of firms reported that depression, anxiety and alcohol abuse are happening at their firms, and that the number one cause of these issues is stress and workload levels.

Lawyers participate in “problematic drinking” at a rate that is 20.6 percent higher than other populations. About 28 percent of the lawyers reported suffering from severe depression, 23 percent said they were stressed and 19 percent said they had anxiety.

Tina Willis, an Orlando personal injury attorney and owner of Tina Willis Law, says that law firms seem to be putting their lawyers’ mental health on the back burner. “I know lawyers given caseloads that are too high, splits or salaries that are too low, and tied to higher and higher caseloads, along with lawyers who are gaining weight, not exercising, often working when sick and rarely taking vacation time,” she says.

There is a high cost if law firm partners and managers don’t address these all too prevalent and alarming issues.

“The risk of doing nothing is that these kinds of impairment can impede the ability of lawyers, and ultimately of firms, being able to practice high quality law,” says Larry Richard, JD, PhD, of LawyerBrain LLC. “This goes to the heart of being competent lawyers, which, in turn, raises ethical issues. These issues absolutely must be addressed in order to ensure that clients’ needs are protected, and that firms’ reputations are protected — as well as for the more humane reason that the lawyers who are suffering need help and that alone should be enough reason to act.”

If law firm partners and legal managers want to help their lawyers who are suffering — or stop these issues from occurring in the first place — they can take the following steps.

RECOGNIZE THE PROBLEM

Many times, law firm partners and managers like to pretend that these problems aren’t occurring, or if they do, they don’t care to address them.

“I’ve certainly heard administrators say they’ve been told ‘Don’t ask ... if we don’t know, we don’t have to deal with it,’” says Teresa Walker, Chief Operating Officer of Waller Lansden Dortch and Davis LLP, and former ALA President.

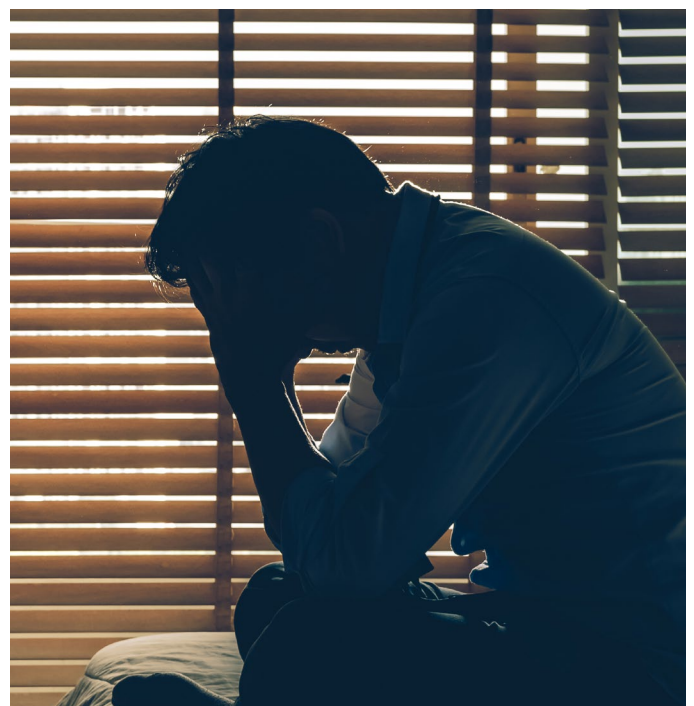
Mental health and substance abuse problems are certainly being talked about more in society in general. That said, firms have more work to do. “More attention is being paid by firms to these issues, but that’s not the same as effectively

addressing these concerns,” says Richard. “I think we have a long way to go.”

The first step is to recognize these problems and start taking action. Walker says that firms don’t keep track of their lawyers’ hours unless the hours are too low or it’s time to pay bonuses. Moreover, few firms track vacation time or whether their attorneys even take it. Firms need to ensure that lawyers are clocking in all their hours, but also not overworking themselves and taking advantage of allotted vacation hours.

According to Walker, firms also must realize that many of their attorneys are going to be type A personalities focused on achievement. Firm leadership should also have a close eye on younger associates who may be working too hard — and may not even recognize it in themselves.

“Young associates are fed to the lions in many firms and wind up working on multiple deals with multiple deadlines for multiple partners,” says Walker. “No one other than the associate typically knows what stresses a young associate



is under. And, any associate who has in mind becoming a law firm partner knows that the harder they work, likely the more work that comes their way. Everyone wants the 'best and brightest' lawyers on their deals. The more partners who know their work, the better their likelihood of being elected to be a partner."

Lawyers also need to identify when they are going overboard and put their mental and physical health first and be cognizant of their own wellbeing. "[They have to] accept that they need to care about themselves, starting with the critical idea that money is not the only thing that they need in life," says Willis. "Then they need to put that realization into action, by some combination of taking fewer cases, perhaps leaving a high-stress job and working fewer hours."

"The risk of doing nothing is that these kinds of impairment can impede the ability of lawyers, and ultimately of firms, being able to practice high quality law."

CHANGE THE CULTURE OF THE FIRM

Many firms today cultivate cultures where lawyers are expected to work long hours, including the weekends. But even research shows that working longer does not necessarily result in better results. According to one study by Draugiem Group, how many hours you work doesn't have anything to do with productivity. What matters is how you structure your workday and how frequently you are taking breaks. For example, employees who work for 52 minutes and then take 17-minute breaks are much more focused than those who do not.

If law firm partners and managers want healthier, more productive attorneys, they should change their cultures, says Nora Riva Bergman, JD, and author of *50 Lessons for Lawyers: Earn more. Stress less. Be Awesome*. "The reality is that the 'work late, work long, work weekends' culture of most law firms is damaging to the attorneys, the staff members and ultimately to the clients they serve. There is a tremendous amount of research in the area of neuroscience, which demonstrates that unrelenting work and unrelenting stress related to that work is detrimental not only to our physical health, but to our brain function and cognition."

Changing the culture involves modifying law firms' idea of success, as well as their reward system. "Much about the profession is dependent solely upon the individual's accomplishments, the sweat of their brow, how much business they generate, how many cases they win, who represents the biggest clients, etc.," says Walker. "The compensation systems at many firms do not reward team play, firm management, training young associates [and] being innovative."

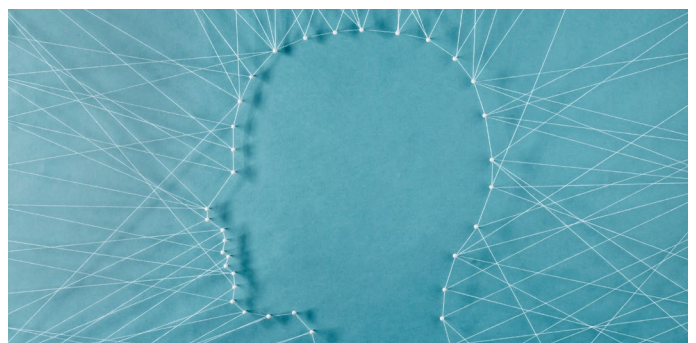
Along with shifting the culture, law firms also need to emphasize prevention on the individual and organizational level, according to Richard. Firms can teach individuals "simple but powerful cognitive strategies that build their psychological resilience and mental toughness, thereby allowing them to cope better with the day-to-day stresses of practicing law," he says.

Richard says it starts at the organizational level, noting there must be a systemic, comprehensive, sustained, multimethod change process. "[This should include] new standards for appropriate behavior, cultivating activities and situations that foster positive emotions, strong role modeling by leaders, training of leaders and rank-and-file partners in the skills of how to foster human thriving amidst an atmosphere that naturally elevates the negative and so forth."

GARNER THE SUPPORT OF HUMAN RESOURCES

Most law firms are self-managed, and according to Walker, there are limited, if any, managers who are professionally trained.

"Few lawyers went to law school to handle HR matters or to any school to manage or lead people," she says. "Despite being extremely smart people, most law firm leaders and managers don't have the training, and most of the time, don't have the real-life experiences to recognize mental health issues in others."



"Young associates are fed to the lions in many firms and wind up working on multiple deals with multiple deadlines for multiple partners. No one other than the associate typically knows what stresses a young associate is under."

The human resources department plays a critical role in promoting wellness and putting best practices into play. They can implement new mental and physical health initiatives, ensure lawyers are clocking in and out and taking vacation time, hold wellness workshops, and stress the importance of using sick and personal days when needed.

On an individual level, lawyers should be getting enough sleep (ideally eight hours every night), exercising regularly and eating well, says Bergman. "While these things are important, the law firm culture must be redesigned to support the individual."

"Legal managers and HR need the support of their bosses," says Willis. "But, if they have that support, then they just need

to recognize the importance of personal time, and flexibility and mental health. If the law firm has a culture that emphasizes quality of life, then the rest will follow." ■

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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From Resist to Resilience

How to build strength and adaptability in today's legal practice.



MARY KATE SHERIDAN
Writer, Editor and Attorney

Lawyers are famous for being risk averse and eschewing change. Yet, in today's constantly evolving world, lawyers cannot hide from the realities of the modern legal industry.

"The legal profession is facing more rapid change in a more diverse set of areas than ever before in history, and the acceleration is mind boggling — it's staggering," says Gerry Riskin, Management Consultant and Founder of Edge International.

Key to thriving in this changing legal world is building one's resilience and adaptability. People who are resilient and adaptable have self-control, says Dean Becker, Founder of Adaptiv Learning Systems. "It's the ability to relax at the edge of uncertainty," he says.

This article will explore resilience and adaptability in the legal profession, why such skills are critical for successful practice, and ways that law firms can foster these skills.

WHAT DOES IT MEAN TO BE RESILIENT AND ADAPTABLE?

Resilience and adaptability go hand in hand. "Adaptability is an important feature of resilience — people who are able to build their resilience find that they're more adaptable," says Paula Davis-Laack, JD, MAPP, Founder and Chief Executive Officer of the Stress & Resilience Institute.

Three characteristics that consistently predict adaptability are cognitive ability,

"Our clients are working on things that are much more complex, making it much more difficult for one lawyer to handle all of the client's matters, which is forcing us to collaborate — a skill we haven't been taught in law school."

conscientiousness (or grit), and openness, according to Shonna Waters, Regional Vice President, Behavioral Science at BetterUp.

"People who are more conscientious are willing to struggle more through uncertainty and difficult tasks, and those who are open are more prepared to revise their initial approaches based on experience or other information," she says.

WHY ARE LAWYERS LOW IN RESILIENCY?

According to a report by Dr. Larry Richard in the early 2000s, lawyers, on average, scored in the 30th percentile in resiliency as compared to the general public's average score of 50 percent. This deficiency has two potential culprits: skepticism and lack of sociability.

"What we know from the resilience research is that two of the biggest things that build resiliency are having a flexible thinking style and building relationships," says Davis-Laack.

Given lawyer's training to issue spot, it is no wonder that they think critically about issues. "Lawyers are inherently skeptical," says Davis-Laack. But this same cynicism that helps them tackle legal issues may impede lawyers as they strive to succeed in the modern workplace.

On top of their skepticism, lawyers score low in sociability, says Davis-Laack, which may make it difficult for them to build relationships — a critical skill for optimal resiliency.

WHY IS RESILIENCY SO IMPORTANT FOR TODAY'S LAWYERS?

Resiliency and adaptability skills may boost client relationships, personal job satisfaction, ability to prepare and perform.

Evolving professional and client demands are changing the legal practice, requiring lawyers to respond and adapt. "Our clients are working on things that are much more complex, making it much more difficult for one lawyer to handle all of the client's matters, which is forcing us to collaborate — a skill we haven't been taught in law school," says Davis-Laack, who adds that the 24/7 nature of modern

practice and the pressure to innovate have also created greater pressure.

And, as Riskin notes, clients have become more innovative and resilient, and lawyers must keep pace. Of course, meeting client demands is reason enough to face resilience challenges head on. But perhaps even more important, building skills to adapt will provide lawyers with greater job satisfaction.

"People will be more engaged if they build their resilience skills," says Becker. "They are going to feel better because they will have learned more than just how to do their jobs and remain more mentally centered — they're also going to find ways to reconnect and see how the jobs they're doing make a difference. Resilient people tend to be highly connected to their jobs."

Plus, adaptive strategies allow people to be more prepared for challenges. "Individuals, teams and organizations are better able to see what's coming down the pike, react to it and be ready for the next challenge when they hone their adaptability skills," says Waters.



Finally, lawyers who build resiliency see positive results in their performance. As Davis-Laack writes in her e-book *From Army Strong to Lawyer Strong*®, “Two studies examined how resilience impacted performance outcomes; specifically, observed performance and goal attainment. Both studies showed large effects for both observed performance and goal attainment. In addition, one study found that resilience training resulted in significantly higher levels of productivity.”

HOW CAN FIRMS FOSTER RESILIENCY?

Firms have a variety of tools at their fingertips to foster resiliency and adaptability among their lawyers and staff.

“The great thing about resilience and adaptability is it’s a learned skill set,” says Becker. “No matter where you are on the continuum, you can build it based on learning skills.”

Here are five ways firms can help lawyers build these skills.

1. Provide Training

Quality training is a valuable tool in terms of resilience and adaptability. In its report, “The Path to Lawyer Well-Being: Practical Recommendations for Positive Change,” the National Task Force on Lawyer Well-Being recommends “that legal employers provide education and training on well-being-related topics and recruit experts to help them do so.”



Research indicates that in-person training tends to be most effective for building resilience, says Davis-Laack. The most important factor is to tailor the training, says Becker: “There are a whole host of solutions, but the real key is to customize the methodology to the needs of the firm, and that can be anything from workbooks to a multiday training program.”

“People will be more engaged if they build their resilience skills. They are going to feel better because they will have learned more than just how to do their jobs and remain more mentally centered — they’re also going to find ways to reconnect and see how the jobs they’re doing make a difference.”

2. Don’t Forget the Top

Also critical for creating a resilient atmosphere is including senior lawyers in the training.

“For a firm that really wants to push resilience and adaptability as an initiative level, the best way to do that is top down,” says Becker, who recommends including firm leadership in live instructor-led trainings.

Firms also should be aware of their partners’ own adaptability skills. According to Altman Weil’s 2018 Law Firms in Transition, 58.4 percent of respondents rated partners’ adaptability to change as low, and 48.5 percent rated partners’ awareness of challenges of the new legal market as low.

Garnering buy-in from senior lawyers is also important, and this may mean making a business case.

“I think the first step is really seeing agility, adaptability and resilience as critical to outcomes in today’s world, core to how we need to operate to stay ahead in the market,” says Waters. “You don’t need to dive head first into these things — try experimental training.”

3. Look Beyond the Individual

Firms should think broader than individual resiliency and consider systemic resiliency. “Teams are becoming a

"The most natural reaction to a new idea is to find everything that's wrong with it. Trained legal minds are extremely good at finding risk and avoiding it."

much more central focus for organizations, so adding a focus on team skills is really important," says Davis-Laack.

4. Promote Flexible Thinking

As part of resilience training, Davis-Laack encourages lawyers to develop flexible thinking and an ability to dial back their skepticism when it's not warranted. Lawyers should develop a "repertoire" of responses to particular situations. And it's important that lawyers remain open to new ideas.

"The most natural reaction to a new idea is to find everything that's wrong with it," says Riskin. "Trained legal minds are extremely good at finding risk and avoiding it."

Firms should encourage leadership to "cultivate and encourage" exploration of ideas rather than immediately shutting them down, as well as saying "no" when necessary, says Riskin.

5. Discourage Burn Out

Prioritizing stress management is also useful in fostering resilience. Firms can assist in preventing burnout by working

with lawyers to "make sure they don't burn out and make sure they recognize their strengths," says Davis-Laack.

"You can be the best lawyer, but if you're burning the candle at both ends, that takes a toll on physical health and mental well-being," says Waters. Firms should strive to "help people develop the skills to demonstrate self-care and help those around them so the organization isn't just successful today but continues in the future." ■

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Vice President of Adams & Martin
Group

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Keeping *all* your staff and associates engaged is an ongoing process critical to the overall health of your firm.”

Blur the Lines Between HR and Marketing to Attract and Retain Top Legal Talent

In today’s extraordinarily tight legal job market, traditional means of recruiting are simply not enough to attract top talent to your organization. Legal professionals are in high demand — even your current employees are targets for competing firms. The good news, though, is that there are steps you can take to rethink and retool your recruiting methods that not only attract talent to your organization but keep your best employees onboard and engaged.

Traditionally, organizations keep their human resources and marketing functions separate: HR hires new employees, onboards them and takes care of myriad administrative tasks; marketing endeavors to position your organization as No. 1 in the consumer’s mind. However, given today’s unprecedentedly low unemployment rate, it’s critical to merge these two elements — and think like a marketing expert — to boost your recruiting power. Much like you use marketing to brand and promote your firm to consumers, you can use a similar marketing strategy to brand your firm as an employer of choice and attract candidates. By blurring this dividing line between HR and marketing, you’ll be able to craft an employer brand that inspires enthusiasm among the best candidates and engages your current associates.

RECRUITING AND HIRING = MARKETING

You know the drill: Your firm needs to hire a paralegal, so you open the job description template and start posting it to all the job boards. That may have worked in the past, but now it’s time to add a marketing twist to your normal recruiting routine. Take a moment to think about what your organization stands for and why someone would *want* to work there. This will help define your “brand” as an employer — what you stand for and what differentiates

you from other firms. Use this information to create a more compelling job description that highlights your company culture and what makes you a desirable employer.

Once you've attracted candidates and made a selection, your marketing activities aren't over. The hiring and onboarding process is yet another opportunity to sell your organization to your new employee. The way you present the offer, the way you welcome them on day one, the way you prepare them for their role — these are all opportunities to create a positive first impression. Throughout these critical early days, you want your new hire to feel confident that they made the right choice in accepting your offer. Use this key moment to reiterate the principles of your organization's culture, which the new employee will be representing.



ENGAGING AND RETAINING THROUGH MARKETING STRATEGY

Employer branding does not end when the new employee is hired and trained. Keeping *all* your staff and associates engaged is an ongoing process critical to the overall health of your firm. Remember — with an unemployment rate of less than 1 percent in the legal industry, your current employees are being targeted by recruiters.

How can you continue to engage your employees? Create events and activities that promote and embody your organization's unique brand. This could take the form of special recognition programs for employees, culture-building events or group outings, or participation in charity-related activities.

Activities that bring employees together will help create a sense of community and higher purpose that bonds them to your organization. Studies consistently show that companies with a strong culture have more loyal, engaged employees.

As you recognize your employees and engage them in special events, create opportunities for them to market the organization through social media, such as sharing a photo of their special "welcome box" when they start, or posting pictures from a company outing to a baseball game. A post by an employee about a meaningful event at work is worth more than paid advertising.

For example, every year the company I work for hosts "Bring Your Kid to Work Day," which employees (and their children!) genuinely enjoy. "None of our company's social media posts get as many likes as the pictures our coworkers post of their adorable kids in business attire 'working' at their desks," notes Staci Johnson, Vice President of Marketing with Adams & Martin Group. Not only does this social media activity engage current employees, but potential candidates will see these posts and gain insight into what type of workplace your company fosters.

WHAT'S NEXT?

Now that you're ready to apply marketing strategies to boost your recruiting plan, where do you begin? However you market your organization to consumers, use the same resource(s) to promote your organization to potential employees. Whether you have an in-house marketing department, you contract an outside agency to do your advertising, or you are a marketing department of one, branding yourself to candidates must become an essential function. Define your employer brand and communicate it consistently to potential and current employees — and you'll have the edge in securing the best talent for your organization. ■

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Kristy Carbajal is Vice President of Adams & Martin Group, a values-driven, full-service legal staffing firm with locations throughout the United States. Carbajal has been with the company since 2005, managing all operations, including teams of legal recruitment professionals who take pride in creating remarkable experiences for their clients.



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We are easy marks for the tech barons and usually shell out some of our hard-earned money on the flashy new gadgets like clockwork.”

Let's Examine the iPhone XS and Surface Go

Every autumn we doublecheck our tech budget to make sure we have plenty of resources for all the new device announcements from the big tech companies such as Apple, Microsoft and Google. Even though the new devices are not groundbreaking in terms of new features or functionality, we are easy marks for the tech barons and usually shell out some of our hard-earned money on the flashy new gadgets like clockwork.

First, Microsoft got us with their breathtaking announcement about their new “iPad killer,” the Surface Go. Then, Apple always ensnares us with each new iPhone model, regardless if it looks almost exactly like the last model. This year, it got us with the new iPhone XS. So off to the tech store we went, cold hard cash firmly in hand, and we came home with two of the most heralded products of the season. Here’s what we discovered when we got home.

MICROSOFT SURFACE GO

First, it should be said that we are huge fans of Microsoft’s Surface line of tablets and computers. So when we heard that Microsoft was releasing a new variant of the Surface that would be more akin to an iPad than a laptop, we immediately were intrigued. When we heard these new Surface Go tablets were going to start at a \$399 price point, we didn’t think twice and bought one on the very day it was released.

So what is so novel about the Surface Go? It is the compact size that differentiates the Go from its larger and more laptop-like cousins, the Surface Pros. The Go touchscreen measures just 10 inches and, to us, actually seems even smaller probably because of the large bezel that surrounds the screen. The Go has the patented built-in kickstand found on other Surface devices, which is a big plus. However, a big minus is the absence of a keyboard for the stated price. As with the Surface Pro, we had to pay extra (\$99) for the keyboard that attaches

magnetically to the Go. Our small investment in a low-cost computer was beginning to grow. And, in our opinion, the keyboard leaves a lot to be desired.

The positive aspect of the Surface Go is that you are getting the full-blown Windows 10 operating system (it ships with Windows 10S that can be upgraded for free to full Windows 10). This means that unlike an iPad or a Chromebook, you can theoretically run any application that you currently run on a Windows desktop on the Surface Go. The downside is that the small keyboard and tiny screen make the Go less attractive as a “work” device.

We see the Surface Go positioned as a light and compact travel tablet that can double as a work laptop in a pinch. We really think that Microsoft is going after the school market with a device that is priced competitively against Chromebooks and iPads. For a good business computer, however, we think professionals would be better served spending a little extra for the larger and more laptop-like Surface Pro.

IPHONE XS

Our next purchase was the much-heralded iPhone XS. We were determined to be TC (technically correct) in pronouncing the name as iPhone “Ten S” (which Apple insists is correct) when we went to the Verizon store. The store clerk looked at us blankly and said, you mean iPhone “Ex S”? So much for being TC.

We looked at both the XS with its 5.8-inch screen and the XS Max with its gigantic 6.5-inch screen (the largest iPhone ever). We both already have oversized phones as our personal phones and our tech budget was dwindling fast, so we opted for the cheaper (but not cheap) iPhone XS. After unboxing this \$999 rectangle of metal and glass, we couldn’t tell a whole lot of difference outwardly between this new iPhone and the

original iPhone X, introduced last year. It’s essentially the same phone outwardly with some internal upgrades.

Of course, the first thing you notice about any of the newer iPhones is that the screen resolution, and clarity is outstanding. We quickly set up the Face ID authentication module that debuted in the X model last year. Face ID works great and is a welcome feature.

Under the hood is where you see most of the significant upgrades on the XS. The processor is more powerful, meaning you can do things more quickly and use less battery. The camera has been upgraded as well. We typically take just one type of photo (point and click), but for those who are more advanced there are new features that can take your photos to the next level. The durability of the XS has been enhanced significantly. The device can survive a dunk in 6 feet of water and spills of soda or beer. We haven’t tested that feature yet, but it’s probably just a matter of time.

We really do love the iPhone XS. We’re just not sure it is enough of a change to justify spending the money to upgrade if you already have the iPhone X (or even the iPhone 8). If you have an older phone and you want a premium smartphone that is top of the line, the iPhone XS is an excellent choice. If you are having sticker shock at the prices on these new iPhone models, you might hang on to check out yet another lower cost iPhone, the XR. We’ll have to check it out and talk about that model later. ■

ABOUT THE AUTHOR

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

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Tips for Building International Business Partner Relationships

By Angelina Angelov, MBA



My journey in the legal profession started almost 15 years ago when I began work with Russin, Vecchi & Heredia Bonetti, a law office in the Dominican Republic. I was promoted to law firm administrator in 2007 and almost immediately started looking for a legal industry business association. Naturally, I Googled this to locate such a resource. And just a couple months later, there I was at my first ALA regional conference, in Long Branch, New Jersey. I immediately fell in love with ALA.

Since 2012, I have never missed an Annual Conference. I have made great friends not just from the United States, but from all over the world — people from Australia, Europe and Latin America. At first, I was looking to improve my education specifically in financial reporting. Within a couple years of my membership, I was taking advantage of the many other ALA educational sessions, networking with other members and relying on ALA's business partners as my principal resource for innovation and knowledge management in my firm.

Several years ago, an international ALA friend told me she came to Annual Conference every year for the education and to shop for products and services in the Exhibit Hall. Unlike her, many international ALA members, when thinking about business partners, tend to concentrate on resources available within their countries. But in today's globalized world, we have the option to choose business partners not only from our country but from others as well. The story I am about to share is of a successful relationship between a U.S.-based business partner and an ALA international member firm — my firm.

When I started looking for legal project management and billing software, I found there were several barriers, including issues with language, multiple currencies and different accounting and tax systems, as well as some particulars related to my firm. I also noticed that an ALA conference's Exhibit Hall would normally be filled with business partners that offer their products and services all over the country (including the VIPs) and business partners situated in the city or the region where the conference was taking place.

It took a couple of tries, but at the Annual Conference & Expo in Los Angeles in 2016, I finally found what I was looking for: a legal project management and billing software that was able to fulfill a number of my firm's nonnegotiable requirements. It had an additional advantage, too — its Los Angeles-based provider offered support in English and Spanish. Most importantly, the business partner was also persistent and flexible, so we went through the entire process together looking for solutions. We finally started the implementation just under one year later, and it turned out to be a success.

BUILDING INTERNATIONAL CONNECTIONS

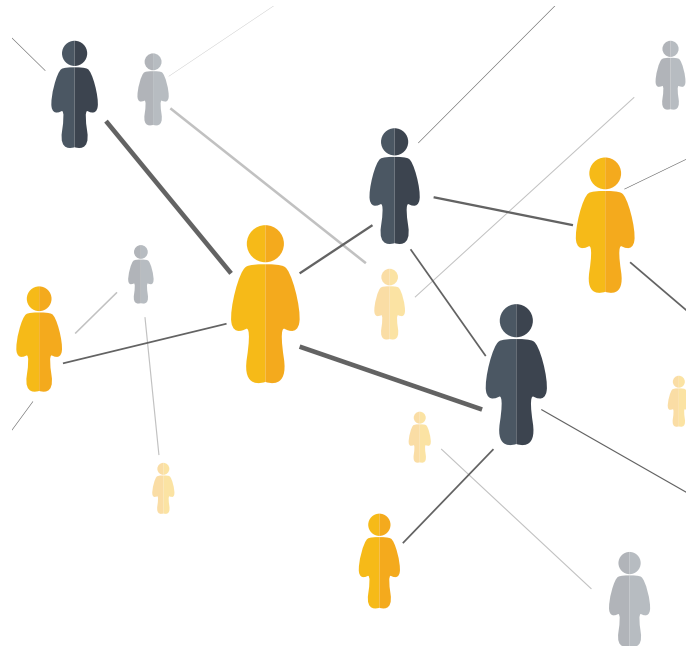
Based on my experience, I wanted to share some tips with other international members looking to establish a long-term, successful relationship with an ALA business partner:

- Have a clear idea of what are you looking for, long before you even start looking.
- Have buy-in from your senior management.

Make sure your potential business partner is patient and understands markets other than the United States — one size does not fit all. A law firm perceived as small for the U.S. market can be considered medium or large somewhere else, dealing with all aspects of business but with a lot less personnel.

- Be sure to have input from all participants within your firm (partners, other lawyers, paralegals, accounting and IT staff).
- Make a prioritized list of requirements. You will almost never be able to obtain them all, but you need to know which are your nonnegotiables.
- Make your expectations clear to your potential business partner.
- Make sure your potential business partner is patient and understands markets other than the United States — one size does not fit all. A law firm perceived as small for the U.S. market can be considered medium or large somewhere else, dealing with all aspects of business but with a lot less personnel.
- Be patient during your selection process. As the principal administrator, you will be held accountable by your senior partners (management) if anything goes wrong. Make sure to tie up all loose ends before you even start.
- If you have all your nonnegotiable requirements assured, prepare a communication plan. Implementing a new software can be frustrating anywhere if you don't deal with it as a project. A simple Word or Excel document can be used, but it must contain dates and responsible personnel.
- Expect that there likely will not be any in-person meetings with the business partner. I only had one in-person meeting with their sales and marketing staff at an Annual Conference.
- Most likely all communication with your potential business partner will be by email or videoconferencing. If you communicate by phone, be mindful of charges — an international call will increase operating costs for both you and your U.S.-based business partner.
- Take baby steps: You do not need to implement all features at once, but make sure to have your short- and long-term objectives.

Perhaps most importantly, remember to be flexible — but still persistent and communicative. In the process of



implementation, a number of things can go wrong. Prepare for resistance, even from people who previously supported you. Flexibility to move expected dates, to smooth the process or to change personnel responsible for the project while regularly reviewing, updating and communicating your plan can be a key to success.

Once you have decided, stick to your plan and do not give up. The success is well worth the time invested! ■

ABOUT THE AUTHOR



Angelina Angelov, MBA, is Office Manager at Russin, Vecchi & Heredia Bonetti in the Dominican Republic. Currently serving ALA as a member of Business Partner Relations Project Team, she has also served on ALA's International Relations Committee.



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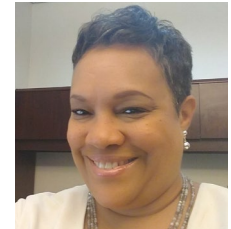
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Monique Terrell

Robert C. Ansani, an independent member from Region 3, is now Attorney at Law at Fuchs & Roselli, Ltd., in Chicago, Illinois.

Shan Galloway, PHR, a member of the Indiana Chapter, is now Staff Compensation Manager at McDermott Will & Emery, LLP, in Chicago, Illinois.

Cara C. Hohenstein, a member of the Puget Sound Chapter, is now Firm Administrator at Terrell Marshall Law Group PLLC in Seattle, Washington.

Amanda Jennings, a member of the Dallas Chapter, is now Business Director at Greenberg Taurig, LLP, in Dallas, Texas.

Jessica K. Johnson, a member of the Minnesota Chapter, is now Assistant Office Administrator at Henson & Efron, PA, in Minneapolis, Minnesota.

DeAnna L. Lopez, CLM, SPHR, SHRM-CP, Region 4 Representative and a member of the Houston Chapter, is now Office Manager at White & Case LLP in Houston, Texas.

Madeline L. McCubbin, a member of the Greater Kansas City Chapter, is now Office Manager at Kutak Rock LLP in Springfield, Missouri.

Frank Schipani, a member of the Capital Chapter, is now Director of IT and Operations at Three Crowns LLP in Washington, D.C.

Theresa B. Smith, a member of the New York City Chapter, is now Office Manager at Selendy & Gay PLLC in New York, New York.

Christine Stangl, a member of the Arizona Chapter, is now Business Director at Greenberg Taurig, LLP, in Phoenix, Arizona.

Kristin Stoddard, a member of the Puget Sound Chapter, is now Executive Director at Summit Law Group, PLLC, in Seattle, Washington.

Monique Terrell, a member of the Capital Chapter, is now Office Administrator at Fox Rothschild LLP in Washington, D.C.

Virginia Wentzel (not pictured), Region 1 Representative and a member of the Central PA Chapter, is now Chief Operating Officer at Metzger Wickersham, PC, in Harrisburg, Pennsylvania.

What's Happening at Headquarters?



THE ASSOCIATION OF LEGAL TECHNOLOGISTS (ALT) CONFERENCE

The ctrl ALT del 2019 conference is taking place February 9-12, 2019, in Scottsdale, Arizona, and ALT is extending a special discounted early registration price to ALA members!

Just register before Friday, November 30 to receive the discounted rate of \$1,595. The price is \$1,795 after November 30. This all-inclusive price includes the three-night hotel accommodations, all food and beverages (with open bar), important networking, "hot topic" educational design think sessions, and 2019 membership fees to ALT. All you have to do is get to the beautiful Scottsdale Plaza Resort!

For more information and to register, please visit www.altnets.org. To receive the ALA member discounted rate, enter discount code: ALA19 at checkout.

RENEW YOUR MEMBERSHIP NOW, GET A BONUS!

Existing ALA members should have already received their notice to renew their dues for 2019 — check your inbox if you haven't! The email contains a personalized web address that will log you in to the ALA website, indicate the amount required for renewal and allow you to pay securely online. (Members can also send a check by mail.)

In addition to the avalanche of free and discounted benefits members receive every year, there's an extra-special treat on offer in this renewal cycle: **Those who renew before January 1, 2019, will receive one complimentary webinar (alanet.org/education/webinars) of their choice** (valued at \$109). Once your renewal is received, you will be emailed instructions on how to redeem this award.



ONLY A COUPLE WEEKS REMAIN FOR RECERTIFICATION

Some Certified Legal Managers (CLMs)® are due for recertification by November 30. If that's you and you are in need of continuing education credits to meet the requirements, check out our archive of *Legal Management* CE courses. These are designed to be a quick-and-easy way to earn recertification credits (though anyone can access them).

Successfully completing the newest course, "Responding to Requests for Proposals: Time, Money, People and the Law," will net you one credit hour in writing skills. Previous courses cover ethics, substance abuse and financial management.



A REINTRODUCTION TO THE GLBC

The ALA is a proud participant in the Global Legal Blockchain Consortium (GLBC), a member-led organization of more than 130 law firms, software companies and other entities within the legal industry. Recently, the GLBC announced several new offerings available to current and prospective participants. Blockchain is rapidly becoming part of the day-to-day conversation in the legal industry. If you haven't already taken a look at the GLBC, we encourage you to visit www.legalconsortium.org to learn more. There is currently no cost to participate. For anyone interested, you can email info@legalconsortium.org to get the process started.

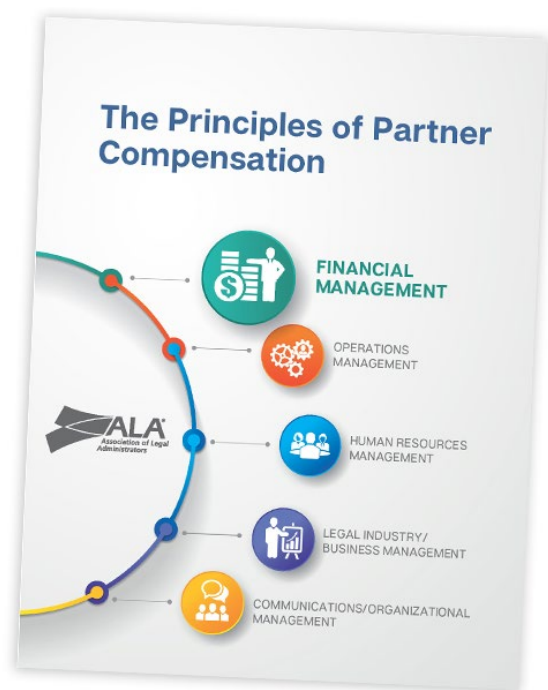


ALA IS SEEKING PROPOSALS

ALA's annual Call for Presentations is once again open to proposals through December 31. This open call is one way we organize the top-rated speakers and educational sessions that make our conferences into valuable, must-attend events for legal management professionals (and for the firms and legal departments that often fund their attendance).

- Do you have a content idea for a presentation? Are you a subject-matter expert with insights to share?
- Have you delivered a well-received presentation to your firm, your chapter or another organization?
- Do you have a speaker to recommend after being in the audience for an excellent presentation or education session?
- Do you know of a business partner who can deliver in-depth knowledge about legal industry trends and applications?

Answering yes to any of those questions warrants a visit to alanet.org/speakers/cfp, which outlines the criteria for proposals and helps interested parties set up an account for submitting proposals.



ALA WHITE PAPER ON PARTNER COMPENSATION

The next ALA white paper "The Principles of Partner Compensation" is now available! James D. Cotterman, Principal with Altman Weil, Inc. details the various approaches law firms use for partner compensation. He offers myriad solutions for how law firms can tackle their compensation programs.

Check out this and other white papers at alanet.org/whitepapers.