LEGAL MANAGEMENT

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SETTING LATERALS UP FOR SUCCESS

Growing your business with laterals requires a robust onboarding approach

LEGAL
MANAGEMENT

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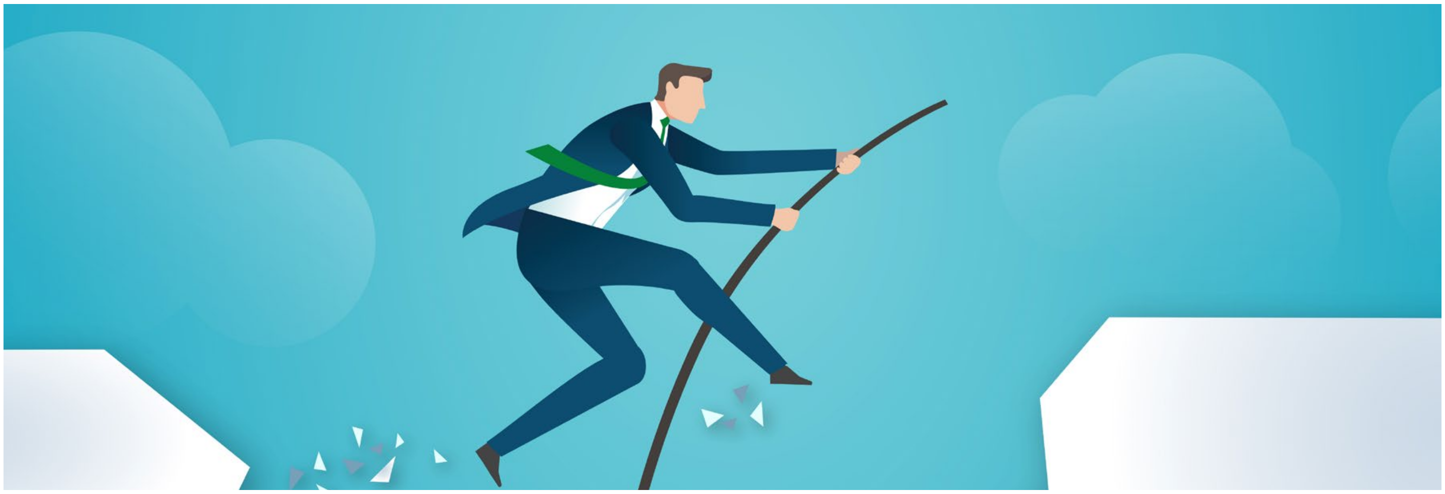

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Making the Leap: My First Day as an Incoming Director on the ALA Board of Directors

Editor's Note: For the coming months, various members of ALA's volunteer leadership will be taking turns writing the Executive Director's Big Ideas column. We hope you enjoy the fresh perspectives they'll be sharing.

So I made it through the nomination process and am newly elected to the international Association of Legal Administrators' Board of Directors. Naturally, I am humbled by the honor and excited to start giving back to an Association that has provided so much to me.

As I traveled to Chicago for my first meeting, all kinds of thoughts swirled through my mind — mainly, could I keep up? I mean, after all, there are some pretty smart people in that room! As many of us know, 80% of what we worry about never comes to fruition. I'm happy to report that this scenario wasn't any different.

Yes, your Board of Directors is a pretty "work hard" kind of group. But their behaviors are just like you would expect at any other ALA event — very kind and accommodating! They have a true desire for everyone in the room to be successful; their greatest concern is that ALA delivers exceptional value to its members.

Rest assured that *your* Association Board of Directors value input, different perspectives, diversity and inclusion, and are always making the best decisions possible

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The day before heading to Chicago, an ALA Past President (she will know who she is) emailed me and told me not to be nervous and to have fun. She also wanted to impart three items of advice to me:

1. Listen more and talk less.
2. Ask questions to clarify.
3. Remember that you are no longer representing one committee or one chapter but the *entire* Association, so your thoughts have to be directed toward the overall picture.

I am thankful for that advice and found those words to be immensely helpful. To the Board's credit, they want honest feedback from the new directors; everyone has a chance to voice their thoughts on a matter. There were a few times where I would hear myself speak, while inside I was telling myself to just *please stop talking*! But the rest of Board listened intently and took value in not only what I was saying, but also in the comments that ensued. After seeing this, I was able to breathe again!

There is an orientation to bring incoming directors up-to-date with issues; a session regarding the bylaws, articles of incorporation and other legalities involved in managing an association; and an introduction to the wonderful headquarters staff. One point of discussion I focused on during the orientation process was the topic of fiduciary duties, which include duty of care, duty of loyalty and duty of obedience.

Honestly, there aren't enough lines for this limited article to discuss all the details. But to suffice to say, it's *a lot* of responsibility. I was very pleased to see that everyone involved takes it very seriously. All decisions are made with a lot of due diligence and *always* with the entire membership in mind before those decisions are finalized. Rest assured that your Association Board of Directors value input, different perspectives, diversity and inclusion, and are always making the best decisions possible.

This, of course, is not any different from the many volunteers within the Association. From chapter resource directors to chapter leaders to committee chairs and members, everyone is doing their best and making the best decisions they can for their local members as well as the Association membership at large. This is what makes ALA such a great Association to be a part of. If you have not had an opportunity to volunteer, what's stopping you? It doesn't have to be on a large scale — any effort is helpful and the local chapters are always thankful for assistance, new ideas, new perspectives and networking opportunities. Grab a buddy and make a leap to become more active in ALA!

After just one meeting of the Board of Directors, I am very excited for this year and the many opportunities afforded through the Association. As the Board of Directors motto states: "No member left behind. We are all in this TOGETHER!"

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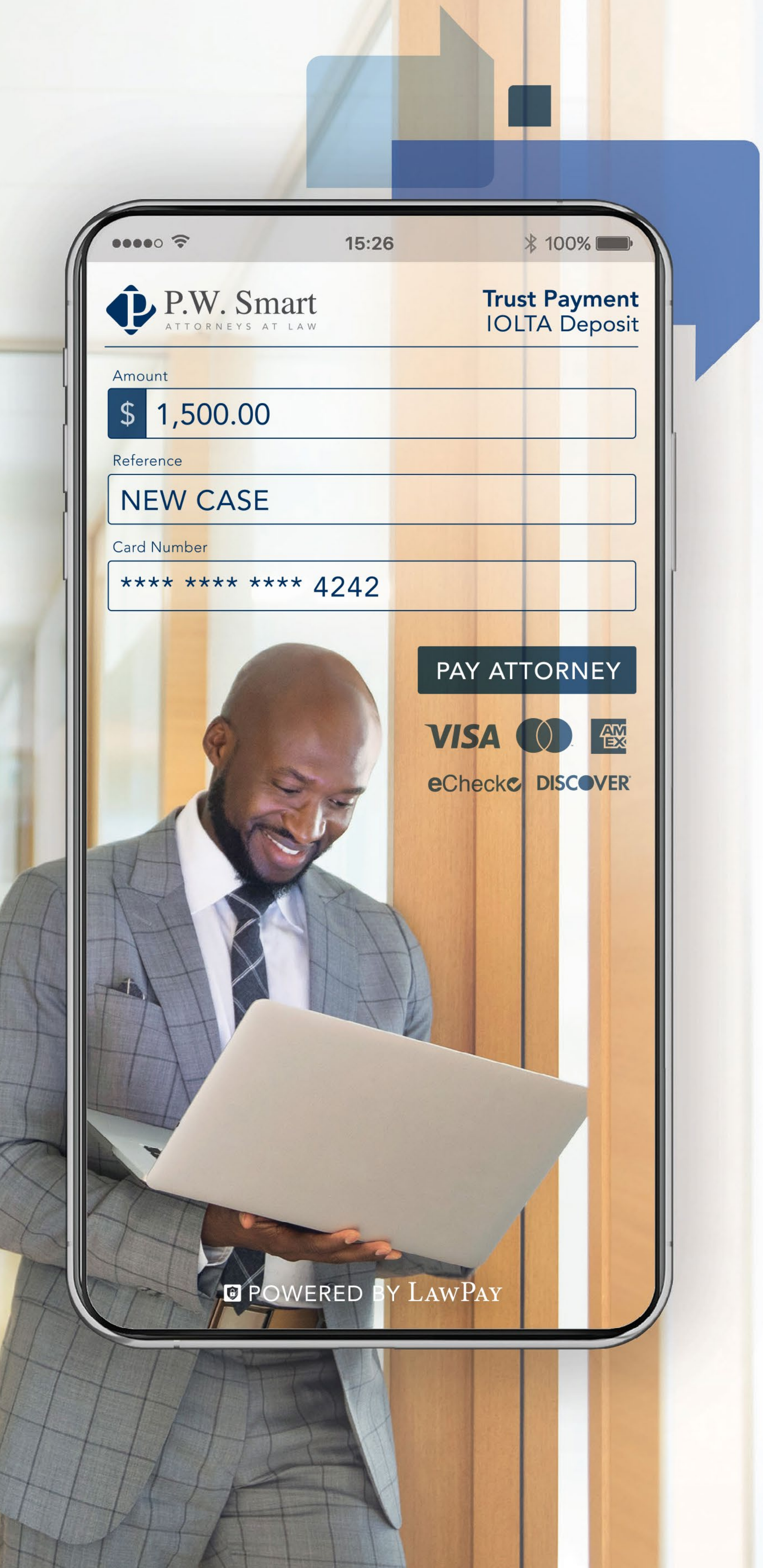

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Built to Last: 3 Successful Partnerships Between ALA Members and Business Partners

The value of the relationships between ALA members and business partners is often one of the top benefits listed when it comes to ALA membership. The end result is the ability to quickly connect people together to solve problems. This article highlights three success stories for three ALA members that each had a need that three business partners were able to meet.

Jerri Buchtel of Frazer Ryan Goldberg & Arnold Partners with Tiffany Winne of Savills for an Office Move

Jerri Buchtel of Frazer Ryan Goldberg & Arnold, LLP (FRGA), an active member of the Arizona Chapter, had a unique challenge. Back in 2016 at her partner retreat, her firm was in growth mode. She was tasked with figuring out how to either find a new space or expand their current space to accommodate more people by 2019. Their current lease did not expire until the end of 2020. She did what all experienced ALA members do: Headed to the ALA Annual Conference & Expo and hit the Exhibit Hall in search of help. She met Tiffany Winne of Savills there for the first time. Savills had recently opened a Phoenix office and was very excited to help.

The office market in Phoenix at the time was very heated, so landlords were not very accommodating. Jerri had met with her previous broker, but they were not in a hurry to help because of the time left on her lease. There was no obvious path forward, so Jerri needed to be creative. Tiffany quickly saw that waiting was not the answer for FRGA and wanted to make sure they had options.

Right after Annual Conference, Tiffany researched the analytics and developed ideas regarding possible strategies for solving FRGA's challenges ahead of their lease expiration. Their goal was to go from 15,000 square feet to 21,000 square feet, but not risk having to pay rent in two buildings at once. Tiffany and Jerri developed some out-of-the-box ideas, and together presented them to the FRGA partners. Because Savills is the only global firm with a pure tenant focus, they can negotiate in a different way and often push boundaries on what's possible in office leases. They also continued to provide information throughout the process. Savills knows this is particularly important for law firms, who tend to make decisions in a very analytical way and want to tap into what other peer firms are doing and compare their decisions before making long-term commitments.

Tiffany saw firsthand how FRGA allowed Jerri to take the lead on the project, which freed the partners to practice law. According to Tiffany, she guided the process, but Jerri was the leader within her firm. Having worked with many law firms, Tiffany has seen too often where too many voices lead to problems. Tiffany was impressed with the credibility Jerri had within her firm, and how Jerri used it to lead her attorneys to a great solution. On the other hand, Jerri saw firsthand how Tiffany and her team were able to negotiate the right solution so the firm could relocate to a superior quality building, 16 months prior to their lease expiration without ever paying double rent. It was a win-win for all sides.

One take-away for members? Office leases are more flexible than most firms realize, and creative structuring is often possible.

April Campbell, JD, formerly of McCullough Hill Leary, Partners with Debbie Foster from Affinity Consulting Group for Software Implementation

Two years ago while April Campbell, JD, was Director of Administration at McCullough Hill Leary, PS (MHL), she quickly realized the firm needed a new back-office software system. As an active member of ALA — having served in many leadership roles the Seattle Chapter, as well as on the International Board of Directors, including as the 2018–2019 President — she's developed a lot of valuable business relationships, even with those business partners that had nothing to offer her firm.

After being introduced to various software programs at the Annual Conference, and then doing her due diligence, the firm selected Centerbase. Centerbase provided April with a list of consultants/certified partners they recommended MHL work with on the implementation. As soon as April saw the list, she knew she would call Affinity Consulting Group, LLC, and Debbie Foster to be their partner. When April selected Centerbase, she didn't even know that Affinity worked with Centerbase, but April and Debbie have had a relationship for years through ALA. That relationship is what prompted April to call Affinity.

Affinity's team took the time to understand how MHL was using their current software, discussed the opportunities to work more efficiently, and then helped April and her team transition to the new ways of getting work done in Centerbase. They helped her team with optimized workflows and provided training for the firm. The nice thing about working with a consultant, rather than direct with the software company is that if the firm had a need for something that didn't work within Centerbase, the consultant could solve the problem with other resources. April's management of the implementation allowed everyone else in the firm to see Centerbase and Affinity as one, and that the transition from their old software to the new one was relatively seamless.

April and the Affinity team learned many lessons as they worked together during the implementation. Perhaps the most important lesson is that the accuracy of a conversion is critical to the success of the project, and it made sense to take the necessary time to get it right for the firm. Having six months to complete the process was ideal for this project, and having a consultant April could trust to work with her through the process was invaluable.

Debbie has seen that overall, ALA members and their firms tend to trust an ALA business partner a bit more out of the gate and are generally more open to their recommendations. There is a level of credibility to the ALA member when you are a business partner that is often overlooked. Also, while Debbie was the person that April originally reached out to, it was other members of her team that worked closely with April to get the software program implemented.

The lesson here for business partners? Build relationships and recognize that your personal brand can lead to an introduction to your business brand. And the final lesson — build relationships with everyone you can, no matter what size firm they happen to be with. Jobs change, roles change and people change — and you never know where the next opportunity lies!

Laura Sears, CLM, with Gould Ratner Partners with Courtney Liptrot with Kastle Systems for a New Security/Keyless Entry System

Laura Sears, CLM, with Gould Ratner LLP, an active member of the Chicago Chapter, started preparing for her firm's move long before it happened. Laura had an idea of the kind of upgrades she wanted to make, and one of her goals was to implement a keyless entry solution. Courtney Liptrot with Kastle Systems has been a business partner of the Chicago Chapter for about three years, and Laura knew she wanted to include Courtney when their keyless entry/security system went out to bid.

Courtney added quite a bit of value through the proposal and scoping part of the process, giving Laura a much better understanding of what the options were. Laura already liked and trusted Courtney because of their relationship through the chapter, but understanding more about Kastle's experience in working with 80% of the top 200 firms in the country was extremely helpful to Laura in choosing the features and options available.

One thing that stood out to Laura and her team that directly influenced choosing Kastle as their security partner was the promise of the level of support they would receive after the implementation. There were several vendors who could have installed the system, but the assistance after the fact, as well as the reviews and ratings Laura found for Kastle's technology and customer service, really made an impact and fit with what Laura wanted to accomplish.

Kastle implemented a managed security platform for Gould Ratner that included, among other things, hands-free access control to the offices. Courtney called this implementation "my baby." It was her first project with a member of the Chicago Chapter, and because she knows how close ALA relationships are, she knew this needed to be a success story. She was very involved throughout the process, regularly checking in with Laura to ensure things were going smoothly and that Laura had everything she needed.

Laura had quite a bit to juggle during the move, and it was a relief to know that Courtney and her team at Kastle were committed to the success of the project. A year later, Laura has no regrets about her decision to select Courtney and Kastle for the security needs of the firm, and Kastle has continued to support Gould & Ratner's needs, making them happy customers!

There are thousands more amazing stories like the three we outlined above. The partnerships between ALA members and business partners can be incredibly valuable to a firm, while saving time, frustration and money. When your firm is in need of a product or service, turn to an ALA business partner — and watch the magic happen!

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MICHELLE SILVERTHORN
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How You Can Overcome Impostor Syndrome

Many people have two narratives. There's the narrative we tell others, and there's our impostor syndrome narrative — the one we tell ourselves. This story is about the second.

I speak a lot for my job, and I tell a similar story in my introduction — my success in school; my practice in BigLaw; my diversity work; the launch of my own business; and my upcoming book on diversity, authenticity and belonging.

But there's the narrative that you don't hear, the one I tell myself — the one that tells me that no matter how hard I try, or how much I work, I never really belonged in any space I was in. Maybe it was the high-stress nature of my job. Maybe it was the loud whispers of "affirmative action candidate." Maybe it was the reality that no one who I worked for ever looked like me. And maybe it was the self-belief that the others were right — I wasn't good enough to be there.

That's impostor syndrome. It's the feeling that no matter how successful you are, you are really a fraud, you are not skilled enough for the career that you have chosen, and you will one day be found out and exposed as the impostor that everyone knows you are.

WHO ARE OUR IMPOSTORS?

The tricky truth about impostor syndrome is that it manifests itself in different ways. The expert who has to know all the answers to all the things because they don't believe they're ever good enough. The perfectionist who sets impossible goals for themselves to reach and when they don't reach them, they start thinking that maybe they just can't do anything. Then there's the natural genius who is always good at what they do and who never really has to try because it's easy to do — until the first day it isn't and then they give up. The rugged individualist who doesn't want to ask for help because they're scared that when they do, people will find out that they don't know what they're doing.

Finally, we have the superhero, who measures their success in doing as many things as they possibly can do. They have to keep working and ignoring that voice inside that's telling them to stop. When they stop, they fail, and then everyone will find out that they weren't good enough to be there in the first place.

WHAT ARE THE TRIGGERS?

The stats say that 70% of Americans suffer from impostor syndrome, and that's certainly true, but there are situations where it's even more likely to occur. For example, the percentage is even higher for women and minorities, like me, especially in workplaces where we are the first and the only. The first in our family to go to college. The first woman to work in this department. The only Latino on the floor. The only black person in this meeting. And when we find ourselves not considered for the "good work," socially isolated in the workplace and our competence implicitly — and explicitly — questioned, we start to believe that false narrative about ourselves.

We often get validation from showing how perfect we are. If I'm scrolling through social media and looking at the person who seems to have it all, I must be a screwup because I cannot get any of it together like that.

Another trigger? Working in a win-lose competitive field. It's having to be perfect all the time where we can't second guess our decisions. It's made even worse because the one thing we can't do is make it look hard. Let me post on Instagram how easy it is to manage my four children, my full-time job, get three meals on the table, and still have nights out with my spouse. We often get validation from showing how perfect we are. If I'm scrolling through social media and looking at the person who seems to have it all, I must be a screwup because I cannot get any of it together like that.

Many of us work in solitude, despite our many emails and phone calls. We don't have our people to listen to our ideas, to help us with our decisions, to shoot the breeze with us, to tell us we did great, and to pull us out of our rut when something does go wrong. That's how professional isolation feels. That's how impostor syndrome keeps cutting us down.

HOW DO YOU SOLVE IMPOSTOR SYNDROME?

Are any of those impostors you? Do any of those impostor syndrome feelings resonate with you? Are you ready to change? If you've answered "yes" to those questions, here are five new rules to follow to overcome impostor syndrome in your workplace.

RULE 1: YOU ARE NOT ALONE

Impostor syndrome, like many challenges when it comes to our mental health and well-being, comes with a stigma attached. Try to remember that you are not the only person to feel like a fraud in your workplace. It's a brave and vulnerable thing to do, but if you can, try opening up to someone. Chances are, they're struggling with the same thing. So, find your person. Have them be your cushion, to embrace you when you're struggling, your trampoline, to bounce you back up to try again, and your barometer, to tell you the truth about what you have achieved and what you still need to do to get there.

RULE 2: PRACTICE ACCEPTING COMPLIMENTS

When people come up to you and say, "You did a great job," so many of us reply with, "Oh it was nothing." Why is it a form of pride to look like it took you nothing to achieve this? Take the credit and simply say this: "Thank you."

RULE 3: GIVE YOURSELF A HIGH-FIVE

Impostors are mostly critical of themselves. When you succeed, write it down. Acknowledge the work it took to get you there. It'll be great for your résumé, too. Plus, when your impostor syndrome is threatening to overcome you, keeping this list will help you remember that you do deserve the praise you receive.

RULE 4: BITE YOUR TONGUE

Just. Only. Yeah, but. I guess. I think — these qualifiers minimize your authority when you talk yourself and others into believing you are less experienced than you are. Here's an easy fix — look at your emails. If you use the word "just," delete that word and start again. Stop disqualifying your own expertise. Stop apologizing for your presence there.

RULE 5: KNOW THAT YOU AND YOUR VALUES BELONG HERE

If you know me, you know I talk about authenticity and belonging every single day. Belonging matters because knowing that you belong in a place where they welcome your authentic self — in both the person you bring to the table and the work that you do there — will go a very long way to making you feel like less of a fraud.

Part of the way to cure impostor syndrome is to hold on to your values, the ones that matter the most to you. Answer this question for me. When you think of the times in your life when you've been the happiest, the proudest or the most satisfied at work, which values come to mind and why? Take some time to think about your answer. Keep coming back to your answer over and over again in your career. It'll help you remember that you are here, that you are a success, and that most of all, you absolutely do belong here.

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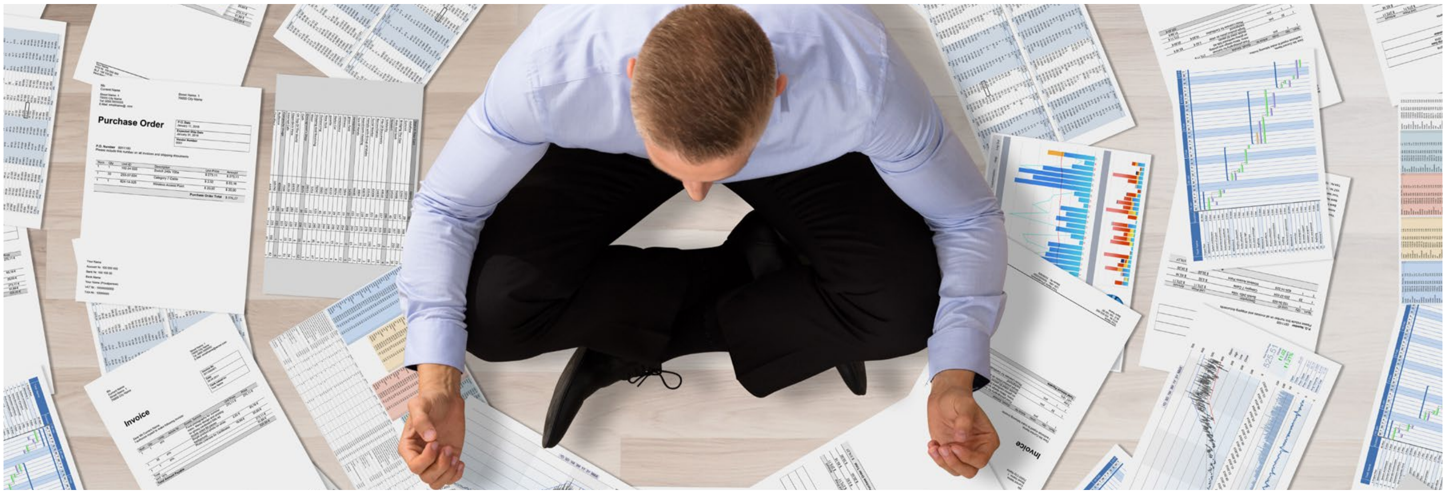

KYLIE ORA LOBELL
Freelance Writer

7 Ways to Refine Your Billing Practices

These to-dos can help generate better cash flow for your firm.

Of all the tasks that go on every day in law firms, there is one that unites across all departments — keeping the business running smoothly while keeping clients happy. One way to do so is to ensure solid billing practices. Without these, the firm would cease to function.

"Having good billing procedures in place is important for cash flow," says Suzette Welling, CLM, President at Law Practice Edge. "If everyone knows the drill and follows it, you will see your cash flow be predictable."

Additionally, client billing helps to maintain a positive attorney-client relationship. "Law firm billing is a communication tool — it tells our clients everything we have been doing on their behalf," says Welling. "Proper client billing creates trust between the firm and its clients and is imperative for a good client relationship as well as a good reputation for repeat and referral business."

If your law firm is struggling with cash flow, or you simply want to rework your client billing process, here are some helpful strategies you can put into practice right away.

1. Clearly Communicate with Clients. Prior to starting on a case with a client, make sure they are aware of your billing practices — set clear expectations up front. Welling suggests giving them an anticipated budget and communicating with them if things change. "For instance, [you could tell them] opposing counsel is creating issues that are increasing the amount of time you have to spend on their representation and taking it beyond budget."

2. Get Your Write-Offs Approved. If your case involves any write-offs, someone needs to approve them before coming up with the final bill. "[It's important to] set up a process whereby attorneys have all write-offs reviewed by a practice group leader or the firm administrator or even the bookkeeper," says Anna Cates Williams, Executive Director at Walker Lambe, PLLC. "Some write-offs are more for convenience of the attorney than [a] necessity for the client. By having a write-off review/approval process, the attorney becomes more likely to sort out an issue or simply bill the client than move the bill to a write-off status."

3. Keep Accurate Time. Your firm needs to have a system in place where it's easy for attorneys to track their time. As Welling points out — if you lose one hour per day at $350 per hour, you'll lose $91,000 annually per attorney. "Firms lose a tremendous amount of revenue due to unlogged/forgotten time," she says.

4. Hire a Dedicated Billing Person. Cates Williams also suggests that someone who understands cash flow, trust accounting and accounts receivable should be in charge of managing the billing efforts. However, attorneys should be involved in the billing process by talking about billing with the client at the beginning and the end of the transaction. "Client bills are often the first and last 'touch' an attorney or firm makes when engaging a client. These bookends are vital opportunities for the attorney to develop (or undermine) the client relationship."

5. Consider Different Types of Billing Models. You'll still need to use billable hours for some transactions like litigation, because you aren't sure how much time the case will take. But for transactions that are simple to duplicate, Welling suggest using a flat-fee model. "If you work out your processes and become really efficient in what you are doing, a flat fee can result in better profits than the billable hour," Welling says. "A mixed fee, such as [a] reduced hourly rate combined with contingency, can be a good option for many matters."

6. Use the Right Tools. Client billing is much easier if you have the best tools on your side. "You want to keep your accounting records as directly linked to your client quotes as you can," says Scott Royal Smith, Founder and Chief Executive Officer of Royal Legal Solutions. "For example, with certain solutions, clients can send their payments directly from a quote. This cuts down dramatically on your administration."Welling recommended Tabs3 and PCLaw. This software not only saves on postage, as firms can email bills, but it also gets bills into clients' hands quicker and allows them to easily pay by credit card.

7. Bill Immediately. After you complete a case, immediately bill the clients. Otherwise, you may not get the amount you ask for. "Bill at the point of highest impact," says Cates Williams. "The client values legal work most at the exact moment the case is settled, or the transactional documents are in hand. Have bills ready before a client leaves the conference room. The longer clients wait for a bill, the more often they question the time spent on the matter."

KEEPING BILLING ON THE BRAIN

Whatever model you're using now or processes you have in place, you can always improve how you're managing client billing and ensure the overall long-term growth of your firm.

"Proper client billing is vital to law firm operations because when attorneys focus on cash flow and revenue, they feel more in control of their performance, the welfare of the firm and their own success," says Cates Williams. "I have found that when partners have their 'finger on the pulse' of their own billing, they spend less mental resources micromanaging other firm operations."

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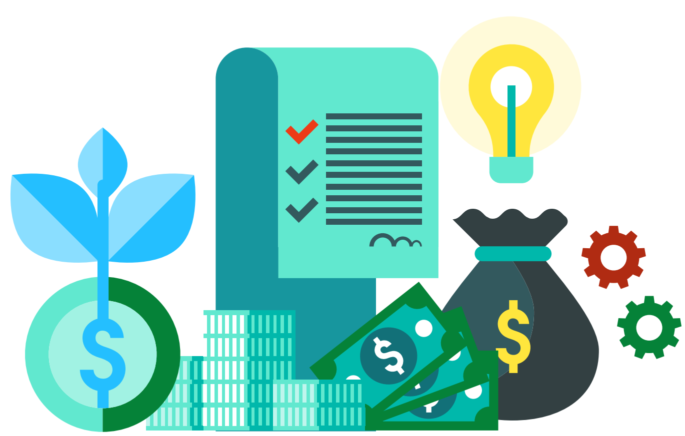

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Setting Laterals Up for Success

Growing your business with laterals requires a robust onboarding approach.

Success in lateral hiring is like a coin flip — literally. According to a recently published ALM Intelligence and Decipher report titled, "*Risky Business — Rethinking Lateral Hiring,*" almost half of all lateral hires leave within five years, and 62% underperform in bringing over their stated books of business.

And yet, firms spend an incredible amount on lateral hiring, from the time investment of key partners, firm leaders and professional staff, to the money — lots of money. ALM Intelligence estimates the all-in cost of hiring a lateral partner in today's market averages $2.3 million, with the most coveted partners costing well over $5 million when it's all said and done.

> "Law firms who play the game of lateral hiring (which is just about all of them), stand to gain quite a lot when it comes to strategic growth."

Law firms who play the game of lateral hiring (which is just about all of them), stand to gain quite a lot when it comes to strategic growth. Most often, the decision to hire a lateral senior associate or partner is driven by the firm's desire and expectation to develop a new area of expertise, gain access to new clients and/or grow in strategic markets.

With so much to gain — and a less than stellar industry success rate — what can law firm leaders do to increase the likelihood and eventual realization of these benefits when hiring and onboarding laterals?

"It is vital that the firm has systems in place to make internal connections and build relationships inside and outside of your practice," says Ellisen Shelton Turner, a lateral hire with Kirkland & Ellis LLP. He says that lateraling to a firm of any significant size can be daunting, especially for one the size of Kirkland.

But there are things firms. In fact, the report indicates four key factors for a lateral's success or failure:

- The hire's longevity at the firm
- The hire's integration into the firm's culture
- The amount of realized revenue that the lateral assists in bringing into the firm
- The lateral's impact on the firm's profitability

We explore these leading and lagging indicators of success with a particular focus on how business development best practices play a role in each factor.

GIVING LATERALS A BOOST IN BUSINESS DEVELOPMENT BEST PRACTICES

Most law firms have embraced the notion that there is strategic value in providing associates with fundamental skill building in business development topics such as personal branding and networking. And plenty of law firms invest in high-potential partners by offering them tailored, individual business development coaching.

But what about the growing group of lateral attorneys who join firms as senior associates or partners? Consider that their training and support needs for business development are slightly unique. They have an opportunity to marry where they have been and what they have been up to with where they are now and the new opportunities available to them and their clients. We believe there are three distinct business development areas around which laterals should prioritize their time and energy when joining a new firm:

- ✓ Targeting and defining their go-to status and brand
- ✓ Creating headline messaging and refined value proposition
- ✓ Building authentic relationships internally and externally

It's an investment that can pay off, according to Tara Gorman, Partner at Loeb & Loeb. "As a recent lateral, my new firm's willingness to invest in the support to accelerate my exposure to the external market while also providing me the latitude to ramp up introductions and opportunities has been invaluable," she says. "I was thrilled when my new firm provided me with a business development coach who valued not only my legal skills but my ability to make true connections with clients and potential clients and teach me concrete techniques to turn those skills into business."

TARGETING AND DEFINING YOUR "GO-TO" STATUS AND BRAND

Your firm hired and courted laterals for a reason. You undoubtedly appreciated their personality and saw them as a good cultural fit. But they were also hired because they have something that firm leaders believe is additive to the current state — be it their current book of clients/business, their specialized area of expertise or some other potential that meets a strategic growth target of the firm's.

Most laterals underperform in bringing over their stated books, because it's not only about current clients; it's also about their (in)ability to grow new relationships and clients under the new platform.

Getting clear on that bigger vision and set of expectations is their starting point. How does your lateral's yesterday translate into their tomorrow? Most laterals underperform in bringing over their stated books, because it's not only about current clients; it's also about their (in)ability to grow new relationships and clients under the new platform.

For laterals, it's vitally important that they learn about their new firm, the partners and specialties, and understand how their legacy target markets can be amplified by what is now available to them. Furthermore, how can the lateral hire be an amplifier to others at the firm?

This has been a vital component for Turner. "From the day I arrived, Kirkland's leaders have been providing opportunities for me and my new colleagues across all of the firm's practices to get to know each other. We quickly identified where my intellectual property strategy and litigation expertise could add value for existing firm clients and we began to set up client meetings accordingly."

To help your laterals define their target markets and establish a go-to status, have your laterals ask themselves the following questions:

- "Who do I help?"
- "Who do I want to help?"
- "What are my competencies and values?"
- "What are the characteristics of my ideal clients in terms of things like business size, industry, geography, maturity, affiliation or situation?"

As they answer these questions, have them get clear on a handful of specific targeted markets/client types. With these as their guidepost, they can begin credentialing themselves. Internally, have your laterals educate your partners on how they can best help firm leadership and their clients. Paint a targeted picture so the partners don't have to guess or misfire when introducing them. Externally, raise your new lateral hire's profile in target market circles through relevant thought leadership and networking.

"I also learned about the many ways that the firm could support my business goals and my prior clients and contacts," says Turner. "The firm's dedicated business development group also meets with me regularly to help find and create new opportunities and synergies. As a result, within months, I already felt well-integrated into the firm's IP practices and also cross-developed multiple matters with our private equity practice."

Law firm leaders should work to clear the path and help new laterals gain access to practice areas and firm leaders who can collaboratively work with the lateral in defining new target markets, taking the best of what has been and bringing it into a new, and improved platform for the firm and its clients.

CREATING HEADLINE MESSAGING AND REFINED VALUE PROPOSITION

Once targets are defined, a lateral must have relevant headline messaging and be well-versed in communicating how they bring value to each type of stakeholder, including partners, existing clients, prospective clients and referral partners.

Essential to their new messaging is being clear on how the stakeholders identify, define and measure value. Have the laterals create key messages that align with what people care about and how their areas of specialty helps them solve problems or achieve goals.

There are three types of headline messages laterals should have at-the-ready when they start at their new firm. Encourage them to answer each of these:

1. **Quick Pitch:** Answers "What do you do?" in a way that helps the receiver understand the types of problems you solve and for whom. Be sure to incorporate your new firm's platform.
2. **What's New Messaging:** Answers "What's new?" in a way that actually informs people of your news in a positive and memorable way.
3. **Stories and Proof Points:** Addresses "Tell me more" in a way that paints a picture for people with examples and stories about how your work has helped people.

Joining a new firm creates myriad opportunities for your laterals to proactively reach out to contacts and share their news. They need to be thoughtful about how they will explain why they joined this firm — why will this move/platform be good for them and for their clients? What about this firm is aligned with their values and goals and those of their clients. Additionally, laterals should help the partners construct their "What's new?" messages about the firm's newest employee and what their expertise means for them and the firm's clients.

Law firm leaders should also create a clear and compelling message that communicates what this addition of new talent means strategically for the firm, its partners and clients. This message should be communicated at all levels, and partners should be coached in communicating it outwardly to their clients as a proactive way to cross-sell the lateral's expertise.

BUILDING AUTHENTIC RELATIONSHIPS

The ALM and Decipher report states that 74% of law firms have cited "cultural fit issues" for being a reason why laterals often don't stay past five years. There's nothing more critical to finding "fit" than for the lateral to quickly integrate and build authentic relationships with their new partners. Firm leaders can create conditions for positive integration by proactively and strategically matching people up, raising awareness across the firm and being intentional with checkpoints and follow-through.

A lateral's ability to build authentic relationships will make the difference in their long-term success, whether these relationships are internal to the firm or external. One way to do this, is to have your laterals maintain a Top 20 list of strategic relationships consisting of partners, clients, prospects and existing or possible referral sources. This can help them stay true to their intentions and focused on their priorities. They can update this list every time you connect with someone so that you are aware of your activity and plan your outreaches accordingly.

Being in touch on purpose and with purpose, means reaching out, connecting with people in a way that they value and appreciate. With every interaction, take measures to get to know people as people — learn what motivates them, what worries them, what they care about and value and what their preferences are. Doing so puts you in a better place to stay connected on an emotional and personal level. This is the level where long-term relationships are created. And again, these best practices apply to key relationships inside the firm as well as outside; laterals should strive to treat their new partners as their clients.

GETTING IT RIGHT

We have found that law firms who are getting lateral hiring right focus on more than just onboarding a new partner. In fact, they place an acute focus on retention. While the concepts are similar, there are nuances between the two that impact the mindset and tactics used to generate success. Onboarding tends to focus on a finite period of time — typically the first 90-days — of joining a law firm. But retention focuses on the long-term picture with an eye toward growth. Such a long-term focus requires structure and discipline, and when done well, can move the needle.

> A lateral's ability to build authentic relationships will make the difference in their long-term success, whether these relationships are internal to the firm or external.

Eversheds Sutherland, a Global 15 law firm with over 3,000 attorneys, recently launched an upgraded lateral retention program. In an effort to improve lateral hiring and retention success, the firm took a hard look at its past approaches. With a critical eye and feedback collected from recent laterals, firm leaders from all administrative departments discussed and documented a 100-step lateral retention process.

The firm's revamped (and amped up) process is managed by a single point of contact and is heavily focused on relationship building objectives and tactics intended to drive retention and revenue generation over time. For Eversheds Sutherland, the documentation of the retention process was critical, as was having a single point of contact — notably a business development professional — for ease and efficiency for the lateral.

"Business development planning and support is really critical to lateral retention, because ultimately, whether a lateral move is working — both for the lateral and for the firm — is going to be judged based on whether the work materializes," says Eric Gruis, Senior Client Service Manager at Eversheds Sutherland. "Making the right connections early, both internally and with the firm's and lateral's client bases and having a strategy for how to leverage those connections, is essential."

Their 100-step process runs the gamut from strategic introductions of colleagues and key client contacts to the minutia of onboarding a new hire, like IT setup, streamlining conflicts and ordering business cards. Additionally, the firm's process pairs the lateral with a key partner who serves as a formal mentor and is someone who can cut through tape and aid in securing critical introductions and meetings. The program also includes regularly scheduled check-ins to proactively solicit feedback at critical milestones. The firm anticipates using this data to not only make improvements to the program in real-time, but to later mine their data for trends and insights about culture and how laterals can achieve even greater success at the firm.

HEADS OR TAILS?

Definitely heads. Finding, hiring and keeping good talent is one of the most important things law firm leaders will do. Flip the lateral failure trend to one of long-term success by giving new laterals the support, tools and skills needed to realize their full potential and feel fulfilled and accomplished in their new firms — your firm will reap the benefits.

"This process doesn't happen overnight. Too often, firms expect magic to happen immediately and the reality is that it takes time, effort and support on all sides. I love being on a team that understands the importance of this support," says Gorman.

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Building a Better Budget

This CE course will cover the basics of creating a meaningful budget for your firm.

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COURSE DESCRIPTION

Budgets are a vital component of any firm's operations, regardless of size. They increase awareness management gleans about the external economic environment in which their firm competes. But what makes one budget better than another? What are the elements that make a good budget and how can you improve your role in the budgeting process, while adding value to the finished product and to your firm or legal department? To be useful, there are certain elements any budget must have and principles one should always follow when establishing a budget. This CE course will review those elements.

COURSE OBJECTIVES

1. Explain how to assemble a meaningful budget for your firm.
2. Describe the key elements of a successful budget.
3. Identify how you can improve your role in the budgeting process.
4. Show the importance of involving other departments in the planning process.
5. Examine common budget types.

Preparing, debating, defending and finally approving budgets can be a tedious process. Even as a finance professional, this is one of my least favorite things to do. I'm much more comfortable with analyzing actual results than the predictive side of finance. My firm, however, strongly suggests I do both. I get it — a budget is a comprehensive financial plan used to both predict and guide an organization's financial and operational goals over a period of time, normally its fiscal year.

> Department managers or practice group leaders — working together with the rest of the management team — should be able to explain these variances to budget, including whether they are over or under budget.

Most law firm or legal department managers spend much of their time and energy focused internally on the day-to-day business operations. But budgets force us to look externally at things like changes in market competition. These can be indicative of how much consumers will be willing to pay for legal services, among other things. For example, changes in the market rates paid for legal secretaries, paralegals, associates and other administrative staff is also important to assess when budgeting.

We'll look at how you can plan a budget that covers all these important facets.

First, in order for any budget to be useful, it must be reasonable or realistic. Sure, it would be nice to increase revenues by a factor of 10, but is it reasonable? A company with revenues of $10 million in 2019 isn't likely to grow to $100 million in the absence of some extraordinary circumstances. So, while we would all like to see this type of top-line growth, it isn't reasonable and, therefore, isn't useful. While predictive by their very nature, budgets must still be grounded in facts.

They are also great tools for performance evaluation. Budgets are used to control costs and monitor progress toward stated law firm goals. Periodic comparisons of actual results to budgets (often monthly) can be the first indicator when financial performance goes counter to predicted results. Department managers or practice group leaders — working together with the rest of the management team — should be able to explain these variances to budget, including whether they are over or under budget. This early indication can be the difference between small adjustments to get back on track and an out-of-control financial spiral.

Additionally, budgets should be flexible. The old adage that "the only constant in life is change" rings true. In today's business world, the rate of change is ever increasing, and the need to be flexible cannot be overstated. Changes in technology, business processes, operating environments and markets can throw the best laid plans into disarray. Managers need to quickly adapt to these changes, but resist the temptation to adjust budgets when they occur — only in rare situations should you adjust the budget. Recall that budgets are used to access and evaluate performance metrics. If these performance assessments point to necessary adjustments to operational goals and plans, those can be noted and explained without updating the actual budget.

Finally, budgets need to be clearly communicated to management and anyone who has influence or decision-making authority. Some firms make the mistake of not sharing the budget with the appropriate team members. In not doing so, they limit the likelihood of achieving expected results. The more organizational buy-in you get, the more potential for achieving success you have. Remember, the budget serves as both a goal and a guide for your firm.

Budgets also help to coordinate the planned activities across firms or legal departments. Seeking input from IT, marketing and all practice groups can make sure that everyone across administrative and legal departments is on the same page. For example, if one practice group is reporting a 30% increase in revenues, this may generate healthy budget discussions across the firm. How much additional marketing will be required to achieve this result? Will the increase be generated by existing staff? Or will headcount grow? If headcount grows, does that require additional software licenses and new hardware? Additional space? What are those costs, and how will we pay for or finance this planned growth?

All these questions would need to be answered and addressed from a financial budget standpoint in order to properly plan for them. Unfortunately, the answers don't all lie in the same type of budget, so we'll need to explore a few of the most common budgets to find all the answers.

OPERATING BUDGET

The operating budget is the most common and perhaps the most used of the three budgets we'll discuss. It deals with the day-to-day operations of the firm and should address anything appearing on the income statement.

These budgets look at total revenues, but should also be broken down into various components depending upon how firms compartmentalize their operations. For some, this could be done by physical location or region, while others may choose to view it by areas of practice. Some may do both, drilling down into various practice areas within each individual location.

Taken another step, the data could be mined further, looking at individual attorney performance within the two broader categories. The point is not which data classifications you use to break down the numbers — rather that you use some system that provides the most meaningful data for your firm to make the best, most informed decisions to keep moving forward. Problems can be isolated much more quickly and efficiently when looking at smaller subsets of data. Remedial action, if needed, can be more targeted, too. The use of cost centers is common and an easy way to categorize and allocate costs across whatever "compartments" your firm determines as most useful.

When considering revenue growth, you may want to first look at the current or immediate past year, as past performance can be a good indicator of future results. It isn't perfect, but I find it a very good starting point. As a next step, dig into the revenue sources and determine which are likely to repeat, which may go away, and which are likely to grow in the coming year. Factors to consider as you look at these three buckets are industry trends, political or regulatory drivers, rate sensitivity, etc. All these factors can be evaluated through discussion with attorneys or practice group leaders.

For example, if your firm is increasing rates by $25 per hour across the board, you may look at the total hours billed last year (or projected for the coming year) to properly account of the projected revenue increase. It's pretty simple math, but can be easily overlooked in the hustle to get something out to your partners or management team. Be conservative when budgeting revenues.

When it comes to expenses, budget fixed expenses first. Many of these will be known, as they don't adjust year over year. Some, like escalation clauses in leases, may increase annually, but they are formulaic and therefore already fixed. Parking, support or maintenance contacts may also fall into this category.

For variable expenses, you will need input from several sources. Hopefully, this will include your marketing department. They should have a handle on projected marketing efforts for the upcoming year and can help with this. Another significant area is technology. Discussions with your in-house technology team or your contracted IT partner should focus around equipment upgrades, new or updated software rollouts, licenses, server replacement and telephone equipment, support, and leasing contracts. As you review planned expenditures, don't forget to include costs for retraining employees.

When considering revenue growth, you may want to first look at the current or immediate past year, as past performance can be a good indicator of future results.

Budgets should take into account as much as you know about the year for which you are budgeting. For example, if you know your firm plans to bring in new associates in the fall, be sure to include this in the budget. Assume new associate offers have already been extended and accepted, and start dates are October 1 of the coming year. Your budget needs to reflect three months of salary costs for the new associates, appropriate amounts for insurance and other benefits that align with any waiting periods for eligibility, any per-employee added costs and appropriate onboarding costs. You'll also need to consider revenue increases associated with the new fee earners.

CAPITAL EXPENDITURES BUDGET

The capital expenditures, or CapEx, budget is used to plan and evaluate needs for investments in your firm's physical assets. Once again, this should be a process involving everyone on the management team. For many law firms, some of the most significant expenditures are for fixed assets. This could be a new or upgraded telephone system, new computer servers, updated desktops, laptops, furniture, a build-out on leased space and a plethora of other items. Anything that would be capitalized on the balance sheet as opposed to being expensed on the income statement belongs in this budget.

Economic recessions or depressions can lead to slow paying clients, aging accounts receivables and reduced cash inflow. Taking time to assess and predict these results can often help firms negotiate more lenient payment terms with suppliers, banks and others who have extended credit to your firm.

Plans to remodel an office or acquire new office space would definitely be accounted for in the CapEx budget. Firms will likely break this down into smaller components, often using the same classifications used in the operating budget, be it location, practice area or department, etc. Once your firm determines what level of investment is planned, they must then determine how to pay for the investment.

Will operations generate sufficient cash to meet current operating expenses such as salaries and overhead? Plus will there be enough left over to fund the capex budget? Will short- or long-term financing be required? These are questions best answered in the cash flow budget.

CASH FLOW BUDGET

The cash flow budget is used to convert accrual accounting back to cash basis accounting, and something management can use to predict cash balances. Firms use this information to determine whether they have enough net working capital to operate during a specified period of time. Positive or excess working capital can be invested to maximize earnings, or used to repay other debt and thus reduce interest expense. Conversely, if a deficit cash flow is forecast, firms may need to consider financing options such as increasing operating lines of credit.

You should also review payment terms extended to firm clients and what the collection history has been. Analyze the overall economic conditions driving your market, too. Economic recessions or depressions can lead to slow paying clients, aging accounts receivables and reduced cash inflow. Taking time to assess and predict these results can often help firms negotiate more lenient payment terms with suppliers, banks and others who have extended credit to your firm.

On the other hand, an economic expansion can lead to quicker payment and having too much idle cash on hand. Management may choose to distribute some of the cash to shareholders and invest in the short term or to simply finance the CapEx expenditures with cash on hand.

PULLING IT ALL TOGETHER

So, where do you begin the process? Two of the most common approaches to budget building are the top-down and bottom-up approaches. As the names describe, the top-down approach begins the highest level, and pushes information down to the various business units, locations, practice group or whatever business segments used in the firm. This normally begins with top level management determining what the overall firm goal is and then asking segments what they will do to achieve these goals.

Conversely, a bottom-up approach normally begins with the lowest level segments reporting their forecasted goals up through firm hierarchy. Attorneys may report individual plans to practice groups, who then report to geographic location cost centers, who then report to corporate or overall firm management. Once compiled, the firm uses this data as a starting point for the budget, often challenging or rejecting some aspects of the budget. This process may force business segments to reassess and resubmit revised plans for the period.

Regardless of the methodology used, the final budgets should be seen as collaborative projects with input from all management team members. This approach not only results in a better, more useful finished product, but it also creates ownership in the process and resulting budget. Everyone involved has a stake in working to meet budget expectations. And when the operating, CapEx and cash flow budgets all work together and your firm has the buy-in from the entire management team, your chances of success go up dramatically. Don't overlook these financial tools and their benefits.

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ROSS FISHMAN, JD
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Goldfish, Zebra Robes and Law Firm Branding

I gave a "Branding, Differentiation and Firm Culture" presentation in Seattle some time ago and the law firm put me up at the Hotel Monaco. I love all the quirky Kimpton family hotels. The rooms are all unique and different, with funky furniture and furnishings. At a Monaco, it's all the little eccentricities that differentiate them and set the tone for your stay.

For example, at a typical Hilton, Hyatt or Marriott, the robes in the closets (if any) are fluffy and white. At a Monaco, they're leopard, giraffe-print or zebra-striped. Simply donning a robe makes you smile — and I'm not really a robe guy.

However, my favorite part was that if you were feeling lonely, they'd bring you a pet goldfish in a nice big bowl. Frankly, I travel regularly and don't get all that lonely. But I always requested a goldfish anyway. When the bellman brought the goldfish to my room, he set it down — along with a tiny table-card informing me that the fish's name was Jason or whatever. It was a genuinely sweet touch.

YOU CAN'T STAY AT A MONACO HOTEL AND BE CRABBY

The little quirks put you in a good mood and on your best behavior. The staff is well trained and highly professional. The accommodations are appropriate for a business traveler, but the innovative touches make it warmer and more personal — a pleasant change.

When I later spoke to the law firm, we discussed culture and differentiation.

"All law firms look alike," the managing partner declared.

I assured him that they didn't have to.

It's up to the firm to decide who they want to be, and how they want their people to behave — what they value and how to execute on it. But we have to decide very specifically and tell them just as clearly, and then we must model that behavior.

As it turns out, the managing partner at this firm also enjoys staying at Monaco hotels. I asked him, what he'd do differently if he decided they wanted to become the Monaco Hotel of law firms? If they wanted to infuse more style and personality into their environment?

You *can* be different. It's simply a matter of choice and leadership, and it starts with understanding who you are and want to be.

I remember walking into the lobby of the Gilbert LLP firm. It had a red Ducati racing motorcycle in the lobby instead of a sculpture, and autographed electric guitars and album covers instead of framed artwork in the hallways — it was a conscious decision. They know very specifically who they are and how they want to be perceived, and they ensured that they told that story as soon as you walked through their doors.

WHAT WOULD BEING DIFFERENT LOOK LIKE AT *YOUR* FIRM

How would you dress? What would hang on your walls? What little robe- or goldfish-like touches could you create that would be appropriate for a law firm, but still get people talking and feeling like they were part of something special? How could you make your environment more comfortable and inviting for your clients? What training would be required? Would you have to hire more or different people?

It's not that you *can't* be different. It's just that you haven't yet chosen to be. But wouldn't it make the firm a more interesting place to work?

Not long after that, I was working in Boise, Idaho, and stayed in the Hotel 43. When I entered my room, I was greeted with a little stuffed bear on the bed wearing an adorable Hotel 43 terrycloth robe.

It's just a little thing, but after a long day of traveling, it really helped set the hotel apart from the typical business hotels. Can you imagine a Hilton or Hyatt doing something like this? No, you probably can't.

It doesn't take much to stand out, but you first have to know precisely who you are and what your message is. Once you do, finding ways to convey that sensibility to the marketplace is relatively easy.

How can your law firm use this same type of idea? And I don't mean tiny plush lawyers in terry robes.

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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MICHAEL PAUL
Chief Technology Officer
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Preparing for the California Consumer Privacy Act

We're faced with a world in which private companies store, enrich, analyze and sell years of our location history, financial habits and even more confidential information, while criminals devise new methods to access and maliciously exploit that information.

It's understandable that people are interested in locating, locking down and establishing ownership of their personal data. Beyond unwittingly serving as the main profit driver of many companies and the danger that it's being held on poorly protected information technology infrastructure, personal data stored by companies is also susceptible to government subpoena.

Increasingly, efforts to define consumer rights over personal data are resulting in new laws and regulations, including the European Union's General Data Protection Regulation (GDPR), the Delaware Data Breach Law and the California Consumer Privacy Act of 2018 (CCPA). The latter went into effect on January 1, 2020, with enforcement beginning midyear, giving law firms and other organizations little time to ensure they and their clients are compliant. California's attorney general is actively formulating regulations to enact the CCPA. These rules will help guide businesses in applying the law to their activities.

> "The rules also require that businesses planning to sell consumer information provide a notice of such at the time they collect that information from their customers."

The CCPA of 2018 broadly provides California citizens the rights to know what personal information a business has collected, sold or disclosed about them; to learn to whom their information was given; to access their information; and to opt out of its sale.

Businesses failing to comply with the law's provisions face financial penalties that start small but quickly add up.

DOES THE CCPA APPLY TO ME?

Many small- to medium-sized businesses will be exempt from the CCPA because they don't trade in consumer data as a main course of business and don't meet the minimum revenue threshold. Nonetheless, it's important that business owners consult with their legal professionals to discuss possible areas in which compliance with these new regulations may be necessary.

The CCPA applies to businesses engaged in collecting, processing, sharing or selling Californians' data ***if***:

- They gross over $25 million in revenue annually; ***or***
- They (solely or in combination with others) deal with the personal information of 50,000 or more consumers, households or devices; ***or***
- They make over 50% of their revenue from the trading of consumer data.

CCPA REQUIREMENTS

Specifically, the CCPA requires that businesses provide consumers the rights to:

- **Disclosure:** Businesses that collect personal information must disclose to requesting consumers free-of-charge within 45 days:
  - The categories of personal information it collected
  - The categories of sources from which the information was collected
  - The business or commercial purpose for the collection or sale of such data
  - The categories of third parties with whom the business shares personal information
  - The specific pieces of personal information it has collected about that consumer
- **Opt out:** They must also allow consumers to stop the further sharing of their information upon request.
- **Access:** Compliant businesses will inform consumers before or upon the collection of information and provide access to that information to consumers upon request.
- **Deletion:** Businesses must delete and direct their service providers to delete personal information upon request from consumers.
- **Nondiscrimination:** A business cannot discriminate against a consumer because they exercised any of their rights to data privacy.

The rules also require that businesses planning to sell consumer information provide a notice of such at the time they collect that information from their customers. Businesses can satisfy this requirement by posting notices on their websites and mobile apps:

1. A **"Do Not Sell My Personal Information"** or **"Do Not Sell My Info"** link leading to a webpage containing a notice of consumers' right to opt-out *and*
2. A **Privacy Policy link** leading to the business's annually updated online privacy policy that includes the following:
   - Consumers' rights under the CCPA, including their right to opt out of the sale of personal information and a separate link to the "Do Not Sell My Personal Information" page
   - The methods for submitting consumer requests
   - A list of the categories of personal information that the business has collected about consumers, sold about consumers and disclosed about consumers for a business purpose in the preceding 12 months.

GETTING COMPLIANT

Business owners should consult with legal professionals to determine their organizations' duties under the CCPA. While the regulations may seem cut-and-dry upon first glance, the ever-evolving digital and legal landscapes require deep understandings of the issues and nuances specific to each organization.

As a recent Federal Trade Commission settlement with a company for falsely claiming to comply with the GDPR shows, failure to comply can result in sanctions without there being a motivating event, such as a cyberattack or data leak.

More important for your business is that your clients expect you to store their data more safely than you'd store your own.

ABOUT THE AUTHOR

Michael Paul is the Chief Technology Officer at Innovative Computing Systems, Inc. and has over 20 years of experience in legal technology. He continually evaluates new technologies and designs systems to deliver new technology solutions to the legal community.

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ALA Congratulates Its 2020–2021 Board of Directors & Chapter Resource Team

The ALA Board of Directors is responsible for establishing the vision, mission and goals of the Association as well as setting its strategic direction.

Members of the Chapter Resource Team (CRT) assist in the development of creative strategies that promote and educate members on the policies, programs and initiatives of ALA, including providing support and resources to chapters and their leaders. In addition to serving as mentors to chapters, team members serve as subject matter experts and they are interested in the further development of their own leadership skills.

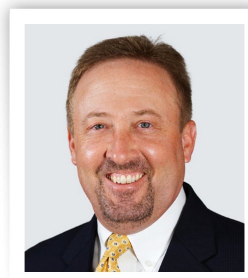
The members that make up these groups are held in the highest regard and have been entrusted to guide ALA and the legal management profession into the future.

ALA is pleased to announce the 2020–2021 Board of Directors and Chapter Resource Team. These individuals will officially take office in May at the close of the Annual Conference & Expo in Salt Lake City, Utah. Please join us in congratulating this extraordinary group of legal management professionals!

2020–2021 Board of Directors

IMMEDIATE PAST PRESIDENT
James L. Cornell III
Shook Hardy & Bacon, LLP
Washington, D.C.

PRESIDENT
Debra L. Elsbury, CLM
Threlkeld Stevenson
Indianapolis, Indiana



PRESIDENT-ELECT
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Flaherty Sensabaugh Bonasso PLLC
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directors

Jenna L. Carter
Ropes & Gray LLP
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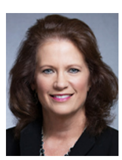
Term: 2019–2022



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Barnes & Thornburg, LLP
Minneapolis, Minnesota
Term: 2019–2021

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Eichelbaum Wardell Hansen Powell & Munoz, PC
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Term: 2019–2021

Geoffrey M. Williams, CLM, MBA, MDiv
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Suncoast Chapter

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Hedrick Gardner Kincheloe & Garofalo, LLP
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Raleigh-Durham Chapter

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Kansas City, Missouri
Greater Kansas City Chapter

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East Bay Chapter

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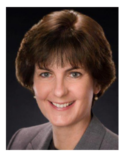
Welborn Sullivan Meck & Tooley, PC
Denver, Colorado
Mile High Chapter

Katherine M. Keele
Lewis Wagner, LLP
Indianapolis, Indiana
Indiana Chapter

Kevin S. Lee
City Attorney's Office
San Jose, California
Silicon Valley Chapter



Clara E. Onderdonk
Ernstrom & Dreste, LLP
Rochester, New York
Western and Central New York Chapter

Holly K. Pulido
Gray & Becker, PC
Austin, Texas
Austin Chapter

Anniversaries, Awards and Appointments

Members on the Move

Nicole Clark, PHR, a member of the Chicago Chapter, is now Office Administrator at Jackson Lewis PC in Chicago, Illinois.

Sandra Dickerson, a member of the Nutmeg Chapter, is now Administrative Manager at Reid and Riege, PC, in Hartford, Connecticut.

Barbara L. Fisher, an independent member, is now Director of Administration at McNally Gervan LLP in Ottawa, Canada.

Heather Kelly, a member of the Puget Sound Chapter, is now Manager, Regional Offices, at Cozen O'Connor in Seattle, Washington.

Roger A. Meertins, SPHR, a member of the Las Vegas Chapter, is now Director of Administration at Venable LLP in Los Angeles, California.

Jessica Miller, MBA, a member of the Sacramento Valley Chapter, is now Firm Administrator at Ellis & Makus LLP in Sacramento, California.

Kathee Nelson, CLM, a member of the Oregon Chapter, is now Director of Operations at Parsons Farnell & Grein, LLP, in Portland, Oregon.

Sending Our Condolences

ALA received word that member **Nancy Jo Davis** passed away in November. A member of the Houston Chapter, she most recently served as Office Administrator for Vorys Sater Seymour and Pease LLP in Houston, Texas. Our thoughts are with her family, friends and colleagues.

Former member **Catherine S. Barron** passed away in October. She was most recently the Washington, D.C., Office Administrator for Proskauer Rose, LLP. Barron held several leadership positions in the Capital Chapter of ALA, according to Executive Director Paula Serratore, and she was named the Hyattsville, Maryland, Volunteer of the Year in 2016. Donations can be made in her memory to Guiding Eyes for the Blind.

What's Happening at Headquarters

There's always a lot going on at ALA headquarters in Chicago. Here's a snapshot of what's in store for the coming weeks.

Get Ready to Attend ALA's 2020 Annual Conference & Expo in Salt Lake City

The agenda for ALA's 2020 Annual Conference & Expo is available to download. Check out the first-class program of content, education and networking that's being offered at this year's event in Salt Lake City, May 3–6.

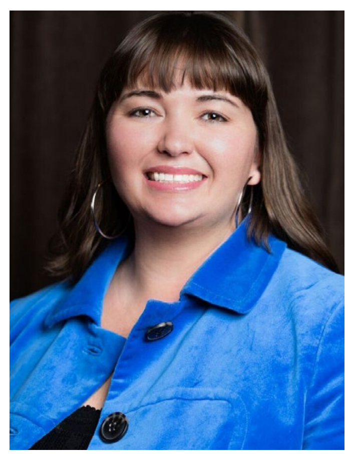
At this year's conference, you'll discover:

- ✔ New strategies to stay ahead of the curve
- ✔ Actionable information from industry leaders
- ✔ Exceptional networking with colleagues and business partners
- ✔ Certification and accreditation hours

Don't miss out on your opportunity to participate in the most significant annual event for legal management professionals and leave with new strategies, contacts and solutions for your company.

For more information, visit *alaannualconf.org* or email *info@alaannualconf.org*.

April Campbell, JD, Joins ALA Staff



ALA is happy to announce that April Campbell, JD, has joined the Association's professional staff as Interim Executive Director. This follows the news that ALA's Board of Directors has initiated a formal search for its next Executive Director after the resignation of Oliver Yandle, JD, CAE; his last day was January 31.

"Serving on the ALA Board and as a member of the Executive Committee has been a privilege and an honor of a lifetime," says Campbell. "I cannot thank the Association enough for the opportunity to serve and the current and past boards for their passion, gumption, thoughtfulness, dedication, good humor and friendship. I couldn't be more excited to dive in to this leadership role at ALA headquarters."

To find the next full-time Executive Director, association executive search firms are being vetted through a request for proposal process, and a search committee has been assembled from a broad and diverse section of ALA's membership.

Any questions or concerns, please contact the *BoardofDirectors@alanet.org.*

C4 Solutions Booklet Now Available

During ALA's 2019 C4 The Legal Industry™ Conference, attendees broke into design-thinking groups using the methods of empathizing, defining, ideating, prototyping and testing. This problem-solving method is critical for practitioners to find improvements to legal service delivery, become more innovative and increase collaboration across the legal ecosystem.

Within their groups, they answered four "how might we" positioning questions and came up with solutions. This booklet contains the results of their design-thinking solutions.

To download the booklet, visit *alanet.org/c4*.

It's Time for the Silent Auction

A popular feature at ALA's Annual Conference & Expo is the Silent Auction, the major fundraiser for the Foundation of the Association of Legal Administrators. For nearly 40 years, the Foundation has focused on the development of education programs, research on the changing legal workplace and increasing awareness of the value of legal management professionals.

If you or your chapter would like to donate an item, please visit the Silent Auction site and ship your item to ALA headquarters before April 10. Bidding will open the Monday before the conference and will close at noon on Wednesday, May 6. All bidding is online, which means anyone can bid from anywhere!

For more information, visit *alanet.org/foundation.*