LM
LEGAL MANAGEMENT

2020 EDITION

YOUR ANNUAL PRINT EDITION OF *LEGAL MANAGEMENT:*
FEATURING 30-PLUS PAGES OF ORIGINAL CONTENT!

ALA® Association of Legal Administrators

Leader of the Pack

Law firms and departments have a lot to gain — including augmented processes, engagement and employee tenure — from internally developing leaders.

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LM LEGAL MANAGEMENT

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CONGRATULATIONS TO ALA'S 2020 AWARD WINNERS!

WE WEREN'T ABLE TO RECOGNIZE THE OUTSTANDING ACHIEVEMENTS OF THESE MEMBERS AND CHAPTERS AT OUR ANNUAL CONFERENCE & EXPO, BUT WE HOPE YOU'LL JOIN US IN CONGRATULATING ALL OF THEM FOR ALL THEIR EFFORTS ON BEHALF OF OUR ALA COMMUNITY THIS YEAR. SEE COMPLETE COVERAGE ON PAGE 32.

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DEBRA L. ELSBURY, CLM
2020–2021 ALA President
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#ALAisHere for You

Change management. These are two words that I have a love-hate relationship with. I love them because change is an action. It is an opportunity and what allows us to move beyond our fears. Change is the best conduit to transformation. On the other hand, I hate it because, well, it's change. I find change creates a fear that is hard to squelch — it is uncomfortable because it is a loss of control and it feels like it's not going to slow down ever again.

In all the years of my professional life, change management — in all its glory, in every shape, style or form — has never been more prevalent than it is now. As legal professionals, we are conditioned to expect the unexpected. But this year has been a challenge even for those of us who thrive on change. In an instant the world changed — plans were upended daily, sometimes seemingly on an hourly basis.

And all along, #ALAisHere for you. We will continue to be here for you. From Roundtables and Hangouts that gather members to troubleshoot current challenges; to timely content in issues of *Legal Management*; to topical webinars on Black Lives Matter and issues with

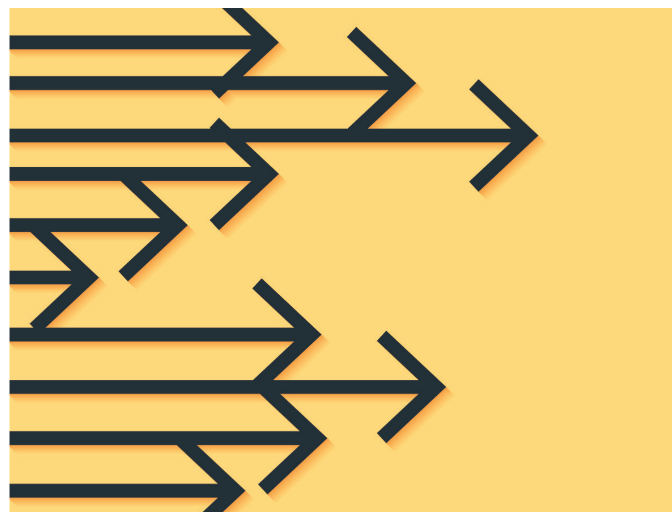
The holding up of one another in these unprecedented waters is the glue that holds our community together and validates the reason for membership. It is a community that truly gives of one's spirit, one's time and one's heart.

diversity and inclusion in your firm; to a Virtual Conference experience; to a regularly updated coronavirus resource page — ALA has been looking at what our members need right now and adapting to make sure the content we deliver is timely and relevant. We, too, are managing change.

While we may not be able to physically be together just yet, I can safely say I have felt such an incredible closeness to the support of our ALA community. (I can also safely say that I have lost track of the number of times I have turned to the Online Communities in a moment of need.) Who else is going to know the pain points of our jobs better than our ALA colleagues? The holding up of one another in these unprecedented waters is the glue that holds our community together and validates the reason for membership. It is a community that truly gives of one's spirit, one's time and one's heart.

Speaking of our incredible ALA community, we have some outstanding volunteers to recognize. I invite you all to turn to Page 32 to celebrate their successes. Every year at our Annual Conference & Expo, we honor our outstanding volunteers, but since we were unable to do so in person in Salt Lake City, we want to call attention to the remarkable work these members have done on behalf of ALA and the legal management community in this last year. Congratulations to those selected — I hope you are hearing the virtual round of applause in your honor!

If there is a silver lining to the turbulence of 2020, it is the forward progression of our profession. What we once thought impossible is possible; what we thought implausible is now plausible. We are learning how to deal with the unforeseen together. What a wonderful time to showcase our leadership skills within our firms and legal organizations.



This is a time for you to expand — you will be better for it and so will your legal organization.

Whether you have a love, hate or, as I do, a love-hate relationship with change management, embrace it — do it. Continue to invest in your own professional development. This is a moment where we can be the catalyst for change — so let's hold some hands and LOVE this together.

#ALAisHere.

As always, it is my pleasure to serve with you and for you. ■

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Credit Card Mythbusting: 5 Reasons Law Firms Still Resist Online Payments

Credit cards have officially become the preferred way to pay, with people able to make purchases practically wherever they are thanks to smartphones and laptops. While this has been great news for most industries, some lawyers and other professionals are still hesitant to jump on the bandwagon for a variety of reasons.

But we're about to dispel five common misconceptions about accepting credit cards online as payment for legal services.

Myth 1: "Credit cards are too expensive."
There's no denying it — if you accept credit cards as payment for your services, you'll have to deal with credit card processing fees. Why? Plain and simple, there's a cost to move

In fact, a recent study showed that as much as 75% of customers prefer to pay with a credit or debit card. Studies have also shown that 74% of households are now paying all of their bills online, and over half of consumers today don't carry checkbooks (or rarely do).

money in our financial system. Either way, more and more professionals accept that this is simply one cost of running a modern business today.

After all, wouldn't you rather get paid instantly via credit cards instead of waiting for a check to arrive several days later — or worse yet, not at all? In fact, lawyers who have made the switch to online credit card payments have told us that, in actuality, the time they save is much more valuable than the fees they pay. Plus, the ability to go paperless will save you both time and money.

Myth 2: "Online payments will only make my practice more complicated."
You might think adding another way for your firm to get paid will come with a learning curve. However, the truth is that a good online payment solution will actually make running your practice easier than before.

By accepting online payments, you'll be able to quickly send your bills via email and your clients will be able to pay you instantly — no more waiting for checks to arrive. While all online payment solutions charge a fee to process payments, the best payment solutions will only debit these fees at the beginning of the following month (rather than on a weekly or even daily basis). This way, your deposit reports will show 100% of the payments you received, which will make reconciliation less complicated.

Myth 3: "My clients have no desire to pay me with their credit cards."
Think about the world we live in today. More and more customers are shopping online for everything from clothes to paper towels to cars. E-commerce giants like Amazon and eBay have completely changed how people prefer to shop and, more importantly, how they prefer to pay. You won't find a "mail check" option on any of these websites.

In fact, a recent study showed that as much as 75% of customers prefer to pay with a credit or debit card. Studies have also shown that 74% of households are now paying all of their bills online, and over half of consumers today don't carry checkbooks (or rarely do).

The bottom line? Your clients would love the opportunity to pay for your services with their credit cards. Allowing them to make payments online with a few clicks of a button will make it easier for them to pay you, which leads to fewer late payments and more satisfied clients overall. It's a win-win for both of you!

Myth 4: "Online credit card payments are unsafe."
As a legal management professional, you're already well aware of how important it is to keep your clients' sensitive personal information safe. Thankfully, online payment solutions can keep this data secure so you don't have to. Look for an online payment solution that's Payment Card Industry (PCI) Level 1 certified — the highest designation possible. These payment solutions are well-equipped to protect payment data and will employ sophisticated security measures that your firm would not otherwise have access to.

By letting your clients pay you through a secure online payment solution, you can take much of the liability of data security off your plate and place it in the hands of trusted security professionals. You'll not only get a payment processor but a payment data security specialist — all in one.

Myth 5: "I can't accept credit cards and maintain IOLTA compliance."
We hear you. You're concerned about how credit card payments would work in light of the ABA's *Model Rules of Professional Conduct.*

According to Rule 1.15, lawyers must be careful to ensure earned funds are deposited into an operating account, while a client's funds go to a trust account. When accepting cash, checks or other traditional forms of payment, it's simply a matter of depositing the funds in the right place. But how does this work when using a credit card?

An online payment solution designed specifically for legal professionals can make credit card payments both easy and ethical. For example, when payments are made via some systems, your earned and unearned fees are always separated and deposited into their proper accounts.

If you want to accept credit cards without getting into hot water, your best bet is to use an online payment solution that understands the legal industry and was built from the ground up to anticipate and accommodate your needs.

These days, accepting online credit card payments is an essential part of running a modern law firm. Thankfully, it's easier than ever to offer this option, and the benefits are overwhelming — simpler workflows, increased cash flow, better productivity in your firm and, best of all, happier clients who pay on time and more frequently. What more could a lawyer ask for? ■

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Increase Engagement with a Virtual Communication Strategy

My inner Gen X cynic laughs at this punchline: "Absence makes the heart grow fonder — *of other people*."

In January 2019, *Forbes* reported that "Healthy and engaged employees, in concert with a strong workplace culture, are the secret sauce for business success." I believe it's communications that help drive culture and employee engagement. When an entire workforce suddenly goes remote, the physical proximity of people and natural flow of communications gets interrupted, which may cause a downward shift in engagement in even the healthiest organizations. Thankfully, modern technology provides the tools needed to bridge communication gaps for a remote workforce.

The COVID-19 pandemic, or the Great Pause, has transformed offices and the future is unclear — namely the transition time back to the office and long-term remote-work policies.

In the end, it's the expressions shared, the words spoken and the actions performed that will determine the culture of an organization.

There is even speculation that a more virtual office is here to stay. Therefore, implementing a communication strategy for growing the firm's culture and engagement levels across a virtual workforce strengthens the overall business health of the organization. Begin creating your strategy by examining three key areas of communication: leadership-to-employee, supervisor-to-employee and peer-to-peer.

BASELINE MEASUREMENT

Assess the situation to discover high-impact areas and opportunities for growth and to get a baseline measurement prior to making changes to gauge success down the line. This may shine a new light on high performers, top supervisors and natural leaders that previously went unrecognized, and provide opportunity to leverage their ideas, talents and skills in new ways.

Here are a few suggestions for measurement:

- What has been the cadence of communications from leadership?
- How often are supervisors checking in with their direct reports?
- Are people struggling or thriving from home?
- Are they engaged or disengaged — *and were they engaged or disengaged prior to the change?*
- Are there any innovative ideas or solutions that work groups are using to promote engagement?

LEADERSHIP-TO-EMPLOYEE

In times of uncertainty, employees need reassurance from their leaders. Transparency and frequent firmwide communications help build trust. Three tools in Microsoft Teams* to explore for communications are Announcements, Live Events and Stream.

Announcements are a great way to draw people's attention to important messages. The extra-large font and blue background for headlines is eye-catching and makes them hard to miss. Messages can be posted across multiple Teams simultaneously with controls to allow or restrict replies. For example, if you want people to turn to their practice department heads or supervisors for more details, restricting the ability to post a reply enforces those instructions.

Live Events provide a simple and secure way to deliver town hall-style broadcasts and allow up to 10,000 participants. They can feature a panel of speakers on video, have a live chat for audience participation, and provide resources for download. All meetings have closed-captioning functionality for improved accessibility. Sessions can also be recorded and made available.

Stream houses all recordings made using Teams and makes them available for replay. Stream generates a full transcript and has bookmarking capabilities. Simply type the timestamp in the description field (e.g., 9:03, new work-from-home-policy) to add a bookmark and allow people to quickly jump to key segments.

SUPERVISOR-TO-EMPLOYEE

People leave managers, not companies. According to Gallup, a person's relationship with their direct supervisor is the No. 1 factor in employee engagement. When an employee feels like their manager cares about their well-being, and when they have regular one-to-one meetings, their job satisfaction increases.

**While examples provided will be based on Microsoft Teams, a combination of tools that allow firmwide messaging, virtual meetings, video calls and instant messaging are available and can be used.*

Teams makes it easy to conduct recurring check-ins between supervisors and employees.

Supervisors can set up a team hub with Private channels for each of their direct reports. This provides a secure location to share and house copies of performance reviews, annual goals and professional development information that both the employee and supervisor can readily access.

Chat messages tend to be perceived as being more personal than email and make it easy to maintain an ongoing dialogue or to recall previous discussions. Additionally, recurring appointments can be scheduled and associate with the channel to allow the same chat window to be used during check-ins to document action items and due dates.

PEER-TO-PEER

Common goals and communities of interest bring people together and forge stronger bonds, so it's no wonder that people who feel connected to their peers and coworkers are more engaged and help to create a healthier culture. Teams is the ideal place for communities of interest because people can post and reply to them when they need a break throughout the day. It easily spans time zones and provides a way for people across offices with similar interests to connect. For a remote workforce, these connections can help people beat isolation and loneliness.

When setting up communities of interest, avoid spinning up separate team hubs for each group. Instead, use a single firmwide team to house all community channels. Individuals can then choose to control channel notifications, hide or show channels, or pin their favorites for quick access. Communities require nurturing. Selecting two people to head up each community and lead discussions will help generate interest and participation.

As you continue to consider ways to increase engagement and strengthen the organization, these are just a few ideas surrounding the vehicles or technologies specific to a remote workforce that can be leveraged for a variety of purposes. In the end, it's the expressions shared, the words spoken and the actions performed that will determine the culture of an organization. ■

ABOUT THE AUTHOR

Carolyn Humpherys is a Learning and Change Management Consultant with Traveling Coaches, Inc. Her work over the past two decades has focused on designing learning and communication strategies that focus on business drivers and moving firms from the planning stage to implementation. She also leads the Culture Team at Traveling Coaches, which feeds her passion for building engaging workplaces

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Leading Through Change

Now more than ever, legal managers will be asked to lead their firms through an unprecedented landscape. This CE course will explain how.

BRIANNA LEUNG
Director of Strategy and Marketing, Much Law

COURSE DESCRIPTION

It's a cliché, but it's true: Change is constant. With the COVID-19 pandemic, we're reminded how dramatically things can change overnight. Legal managers who are well-versed in change management can minimize the negative impact and move the firm forward. By leveraging change management techniques and tools, leaders can help the process of change be more positive, purposeful, collaborative and successful for everyone.

COURSE OBJECTIVES

1. Identify the four truths about change.
2. Recall why humans tend to resist change.
3. Examine the role legal managers play in bringing about change to an organization.
4. Review how to create a strategic charter.
5. Recognize the four change management plans.

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FOUR TRUTHS ABOUT CHANGE

1. Change is a process. Change has to be managed to succeed. Transformation studies over the decades suggest that nearly three-quarters of change initiatives fail to realize their planned benefits or that they are abandoned before completion. And while many factors will contribute to an unsuccessful change project, often the No. 1 obstacle is employee resistance and the ineffective management of the people side of change.

As displayed by the national and local change efforts during the spread of the coronavirus, change is a process. Leaders can't flip a switch and make a big statement and expect that people will follow. When people were initially asked to "socially distance," most didn't comply, believing that the warning either didn't apply to them or wasn't important enough to put up with the inconvenience of it. It took several days and weeks, along with forced orders and shutdowns, for people to widely adopt the request. **The more leaders understand the human factors at play and recognize that people react, process and ultimately buy in to change at their own pace — and are driven by their own motivators — the more successful they will be.**

The process of change can be measured at the organizational level and at the individual level. Given that an organization is nothing more than a group of individuals, it's the latter that will determine the former.

There are several change models professionals might consult to account for the individual process of change. A simple and easy one to remember is the Kübler-Ross Change Curve, which stems from Elizabeth Kübler-Ross's Five Stages of Grief. This describes the emotional stages people go through when processing change. It makes sense that humans process change in a way similar to how they process losing a loved one: the beginning feeling of shock, followed by denial, frustration, depression, experimentation, decision and finally integration — in other words, living the new normal.

In any change model, researchers cite a dip where people are at their lowest morale and productivity — the depression stage, according to Kübler-Ross. This dip is more commonly referred to as the "Valley of Despair." This is the stage where businesses see a drop in performance but an increase in cultural and behavioral issues and employee absence due to stress and illness.

When leaders effectively plan for the people side of change and factor the individual change process into the bigger picture, they can minimize the negative impact and duration of the Valley of Despair. By leveraging change management techniques and tools, leaders can help the process of change be more positive, purposeful, collaborative and successful for everyone.

2. People have an emotional, human reaction to change. Everyone knows that change is hard and uncomfortable. In the case of COVID-19, all changes have been hard and uncomfortable — some to the extreme. The backdrop for these changes is a scary one; it certainly can be difficult to find many positives in this.

But if one looks, there are some unexpected positive outcomes: professionals becoming more adept at working remotely; working parents and school-aged children having more time together; people placing more interest in humanity than in the day-to-day grind of work; and increased community-building through creative means.

When planning organizational change in law firms, it is important for leaders to acknowledge and reinforce that while change can be uncomfortable and often hard, it also comes with positives. Some people will perceive change to be a welcome relief to a negative situation; others might find change to be an injection of energy, hope and excitement into their status quo. And for others, change might be a blessing in disguise that only becomes apparent after the fact.

One universal truth about change is that **people don't mind change as much as they mind being changed**. When people feel like they have no choice or control, they will have a negative reaction that could set the course for change into an irreversible down curve. The more people feel their rights are being taken away, the more they resort to fear, anger and resistance. Therefore, another critical area of planning and execution for change leaders is communicating in ways that demonstrate how people will personally benefit from the change and offering ways for people to participate, have a voice and control the things they can control.

3. In the absence of information, people make stuff up. Another universal truth to change is that people do not like to be surprised. Most people prefer predictability and stability. When faced with changes to the status quo, people experience fear, uncertainty and doubt (or the FUD Factor). After all, it is human to fear the unknown. When people receive inconsistent, vague or misleading messages about what is happening and what to expect, they can go to a dark place and assume worst-case scenarios.

Consider the rumors and mixed messages that have spread since the coronavirus pandemic began. Health professionals have said one thing, government officials have said other things, and the two haven't always been aligned. And suddenly toilet paper went from being a commodity to a highly coveted essential item. Yet no leader ever suggested that toilet paper would be affected by the coronavirus or that people should expect to need a large supply of it on hand. People made that up.

Confidence and trust come with understanding. This is why clear, consistent, open and compelling communication is a change leader's most important job. Leaders must communicate the truth about what is known and unknown, and they must be aligned and consistent. Furthermore, communication should come in terms people can understand and personally identify with. The use of storytelling and visual references helps to make complex or difficult information easier for people to process and act on.

For example, many people in the United States who didn't fall into the high-risk categories for contracting a severe case of COVID-19 did not understand or appreciate why they should socially distance or avoid going about their daily routines. Then, flatten-the-curve imagery and concepts went viral through memes on social media and news outlets across the country. The brilliance of "flatten the curve" is in how it very simply illustrates the why behind the changes people were being asked to make. And while this alone did not compel everyone to change, it certainly did motivate many people to make the changes that were asked of them. That image gave people a way to easily talk to others about why these individual changes were important to the greater society. To change behavior, people need to understand the personal gain and pain that results from changing versus not changing.

4. Change is constant and isn't going away. If you look back to just January, this insight could not have been truer. Since the coronavirus outbreak hit the United States, Americans have been inundated with changes on a near daily basis, with little sightline into when life will return to normal and whether the then normal will be vastly different from yesterday's normal. Yet people are beginning to cope with constant change and have built a sense of resilience for adapting to whatever is the next disruption and change.

Law firms would do well to take a page out of the Centers for Disease Control and Prevention's (CDC) pandemic playbook when it comes to rolling out large-scale change in smaller incremental measures. For

example, the CDC likely knew that schools would need to be closed for an extensive period of time. But rather than coming right out and closing schools for three months, leaders began with two weeks and then added another two weeks and so on. By the time parents began to realize what the CDC already knew, they had already been forced to establish new routines for working from home while caring for their children. This made them more able to psychologically cope when the fuller picture came into focus.

While organizations hopefully won't face crises like the coronavirus on a regular basis, it is safe to say constant change is already here and will only increase for organizations. The more leaders can create an organizational competency (or playbook) for change, the more internal and external stakeholders will not only accept firm changes but will also ultimately want to contribute to the success of a more nimble and responsive law firm.

UNDERSTANDING YOUR ROLE AS A CHANGE LEADER

Organizational change requires a coalition of leaders who are invested in seeing the change initiative through to the end. The most successful changes will be spearheaded by an executive sponsor who carries a high degree of influence across the firm's multiple stakeholders. This person will cast the vision, sponsor the charter and be the highest promoter of the effort, while building a coalition of other leaders and influencers at various levels across the organization.

In addition to the sponsor coalition, there is a specific role for managers/practice leaders who will provide representative input to the change process while serving as an advocate, coach and mentor to the people they lead. And, finally, a change project will require a change manager who's responsible for developing and managing the execution of key change management plans that will produce the desired and perceived benefits of change adoption.

CREATE THE VISION AND STRATEGIC CHARTER

A change initiative without a strategic charter is doomed to fail because it indicates that firm leaders have not thought all the way through the vision, purpose and impact of the change. That could mean that this is not the right change to be making, or at least not right now. Leaders may use the following questions to guide their design process of the vision and strategic charter, which will need to be clearly communicated to internal, and possibly external, stakeholders:

- Why change? What happened? Why now?
- Where are we going and why there?
- How will our people be impacted and involved?
  - What change(s) will they experience?
  - How will they benefit from the change?
  - What is important to them?
  - How will it be hard for them?
  - What happens if they don't change?
  - How can people participate in the change process?
- What will be our detractors?
  - What needs to happen before we can fully execute our vision?
  - What else is changing and impacting our people and resources?
  - What client and/or market forces will present challenges?
  - Where do we anticipate internal pockets of resistance?
- What does success look like?
  - What needs to have happened by what time for this to be considered a success?

DESIGN THE CHANGE MANAGEMENT PLANS

The following four change management plans are blueprints for how the change will be communicated, supported and reinforced throughout the firm. They are geared specifically toward managing the people side of change. Often, these plans will overlay project management plans that focus on the logistics, timing and execution of the change implementation itself.

A **Communication Plan** maps key messages from firm leaders and influencers to various stakeholder groups, along with the planned communication vehicles, drafting, approval and timing for each message. Communication is often the item people point to in hindsight when asked why a change effort was a negative experience. Therefore, proper communication planning and execution is incredibly important and each communication should be thoughtfully constructed and tailored in a way that helps people to best receive the intended key messages.

People want to understand the big picture and the "why" from the executive sponsor and leaders of the firm. And they want to hear the specific benefits (WIIFM — what's in it for me?) from the person who manages them and understands their day-to-day better than others in the firm. Furthermore, people prefer and will respond better to face-to-face and personalized communications than to impersonal emails. A good communication plan incorporates a variety of modalities to provide clear and compelling communication that creates buy-in, motivates people to take action, sets expectations and encourages feedback.

A **Training Plan** outlines the required skill-building and knowledge-sharing across the firm. Training can be implemented in a variety of formats, including in-person facilitated sessions, virtual live events, recorded on-demand videos and self-guided learning. The training plan should map out the various types of training that will be available for different stakeholder groups and account for logistics, efficiency, effectiveness and desired outcomes.

A **Coaching Plan** equips key leaders to coach and mentor the people they lead. Organizational change happens one person at a time and can make a large-scale change project feel overwhelming, particularly in a large organization. The larger the organization, the larger the coalition for coaching and mentoring will need to be. While change acceptance happens at an individual level, so does change resistance. Leaders need to spot and manage resistance within their stakeholder groups, advocate for the change, set a positive example and help people through the process at an individual or small-group level.

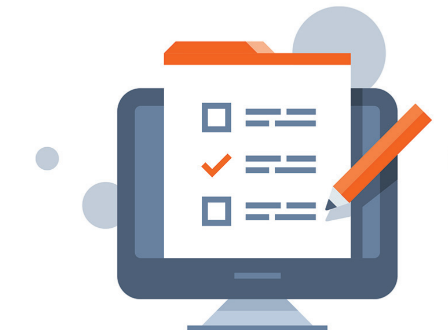
A **Momentum Plan** guides the reinforcement of the reasons for change, tracks successes against an established scorecard, communicates positive results and identifies opportunities for continuous improvement. Often, there is a lot of energy and communication at the beginning of a change initiative that slowly tapers off as sponsors and leaders get busy with other priorities. It's important to keep the momentum going until adoption and performance goals are reached, which may be a rolling timeline.

Furthermore, leaders need to recognize when people have slipped into their old ways even after initially demonstrating adoption of the change. Therefore, reinforcement and continued check-in, training and coaching is important sometimes for several weeks or months afterward depending on what the change is and how easy it is for people to work around it. To reinforce the positive outcomes produced by change, leaders should celebrate and share early wins and tell success stories of how the change has made a positive difference for attorneys and clients.

CREATING A FIRM COMPETENCY FOR CHANGE

There is no better time than now to commit to creating a competency for change. Each time change is implemented ineffectively, people add it to their banks of learned failure as another example of how change is hard. Learned failure or success happens when people have repeated experiences of failures or successes and they come to learn and expect more of the same. These experiences imprint in people's memories and cause them to go into the next change with either a greater sense of trust and confidence in the leadership, or with a greater sense of dread and skepticism.

Leaders will find that each change success breeds less resistance for the next change. By continuing to follow change management principles leaders create conditions for people to buy-in and be successful. As a result, the firm will eventually develop a core competency that enables it to be agile, nimble and change-ready in times of crisis as well as in times of opportunity. ■



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ABOUT THE AUTHOR

Brianna Leung is Director of Strategy and Marketing at Much Law. Her perspective on change management is shaped by two decades of experience helping people inside law firms conceptualize, lead and embrace change. Leung has also worked at prominent legal consulting firms such as GrowthPlay and Traveling Coaches. She is a certified Prosci® change management consultant and popular author and speaker within legal industry groups. She lives in Chicago with her husband, two young kids and a big blonde dog.

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Leader of the Pack

Law firms and departments have a lot to gain — including augmented processes, engagement and employee tenure — from internally developing leaders.

ERIN BRERETON
Owner, Chicago Journalist Media

When Natalie Loeb, Founder and Chief Executive Officer (CEO) of coaching and consulting firm Loeb Leadership, was employed as the staff training manager at Skadden, Arps, Slate, Meagher & Flom in New York City more than 30 years ago, she found management development workshops the firm offered had a marked effect on interpersonal conflict.

"You started to see managers who had what could be described as high-drama teams learn new ways to set expectations, give constructive feedback, provide recognition for a job well-done and manage tension," Loeb says. "How people worked together improved; drama was reduced — and the teams got work done more efficiently."

Loeb, who went on to create a similar program for emerging and seasoned managers in the legal industry, has found attorneys in leadership roles are often good at overseeing strategic

> "Firms have to continue to challenge individuals and nurture these talents so they stay with you. It's no different than with lawyers; you train them after you bring in first-years so one day they'll become income-generating partners. There's a competitive nature on both sides of the fence now; that's a realization I'm not sure every firm gets yet."

and operational responsibilities like hiring talented associates, selecting the right software solutions and managing budgets. Yet they can struggle with the complexities involved in managing people.

"Giving feedback, fostering a collaborative team, taking the pulse of the team, demonstrating empathy and support to increase confidence and performance in others is an additional skill set they need to be successful," Loeb says. "Most often, they haven't learned these skills in law school."

While a number of administrative leaders possess fairly developed leadership skills, due to the collaborative nature of their work, some may face separate issues trying to gain influence if firm members don't fully appreciate their skill set, according to Sheila Murphy — a former corporate senior legal officer who's currently President and CEO of Focus Forward Consulting, which provides leadership and business development coaching to lawyers and legal organizations.

"There is a challenge for [legal support staff] to garner the same respect," Murphy says. "They need to take the time to understand the language and motivators lawyers are working with to have the most impact; that actually applies to everyone when it comes to leadership."

MANAGEMENT ROADBLOCKS AND REWARDS

Participating in professional development programs takes attorneys away from legal work that can translate into revenue. As a result, efforts to enhance leadership skills within law firms or legal departments aren't always an easy sell.

Likewise, investing in legal administrators' leadership training can be viewed as an expense that doesn't offer a potential business development payoff, according to John Jakovenko, CLM, MBA, SPHR, SHRM-SCP, Firm Administrator at Georgia-based law firm Sparks Law.

"When you hire [an attorney], it's agreed you'll spend X amount a year to continue their CLE requirements," Jakovenko says. "If you hire an administrator, even an IT director or HR manager, those things are kind of added on after they're hired, asking if they can get reimbursement. We want to increase our knowledge skill set, but it's seen as a hard cost."

Leadership development, however, can have a significant outcome. A lack of confidence in firm management and strategy is the No. 1 reason partners leave law firms, according to a 2020 Major, Lindsey & Africa lateral partner survey.

Imparting leadership skills can also be an important part of administrative staff retention efforts, according to Frederick J. Esposito, Jr., CLM, MBA, Chief Operating Officer at Rivkin Radler, a law firm with offices in New York and New Jersey.

"Firms have to continue to challenge individuals and nurture these talents so they stay with you," Esposito says. "It's no different than with lawyers; you train them after you bring in first-years so one day they'll become income-generating partners. There's a competitive nature on both sides of the fence now; that's a realization I'm not sure every firm gets yet."

CRAFTING QUALIFIED LEGAL AND OTHER MANAGERS

Leadership ability can encompass a number of specific skills — communication, for instance, is one of the top three

skills chief legal officers are striving to develop among their corporate legal teams, according to a 2019 Association of Corporate Counsel CLO survey.

Good communication skills were one of the four qualities law firm leaders most frequently referenced when asked in a Law360 interview series what traits are most important for a law firm partner to possess.

Lawyers, though, aren't always taught how to effectively give constructive feedback, according to Murphy.

"It's an area where the legal profession could do a better job," she says. "People might [say] something like, 'Good job' and think that was feedback; it's not actionable. They need to tell me what I did precisely that was good and what the impact was because that reinforces behavior."

In a Robert Half Legal survey, "Beyond Legal Expertise: What Makes a Lawyer a Great Leader?", attorneys identified collaboration skills and tact and diplomacy, along with good judgment and high ethical standards, as the most important attributes a law firm or legal department leader should possess — abilities that can help them successfully address workplace conflict and anxiety.

"A leader has to be able to gauge how team members are doing in a stressful situation and make sure they're not putting too much on any one person — and are having honest conversations if they think someone perhaps is not

> "ALA offers a lot of professional development opportunities; it's up to us as a collective community to get that message out — administrators should be the ones taking the profession to the next level."

handling the situation well," Murphy says. "If leaders can't handle stress themselves, it permeates throughout the whole team and can make it not be as impactful as it can be."

Trouble can arise, for example, if a legal manager's approach to managing change doesn't convey a sense of calm, or if the person fails to give people an explanation they can appreciate or time to absorb the news, according to Murphy.

"People go back to what their parents said to them: because I told you so," she says. "You need to make your case and make it again, and then you have to bring in people at different levels to help you make the change you want. [Managers sometimes] get frustrated and feel people should just get on the train; it takes a huge amount of time and effort to do change management well."

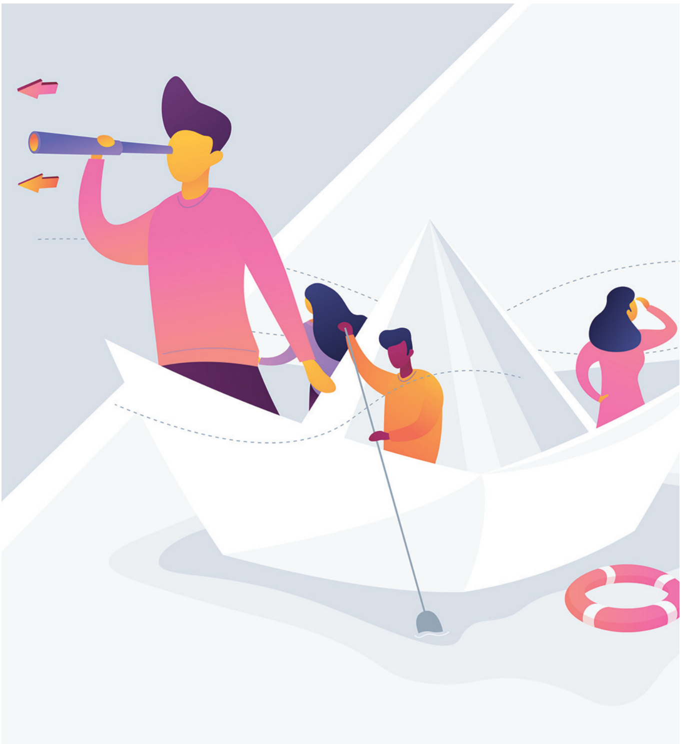
Leaders' overall performance can be considerably affected by their capacity to relate to and connect with employees; although some leaders may not quite realize it.

A global Morrison Foerster study, "The GC Redefined," for instance, found 81% of general counsels feel being a member of their organization's C-suite is fundamental for them to be able to influence their CEO and board.

Although the study's authors noted consensus building and influencing the C-suite would require greater use of emotional intelligence, rather than intellectual intelligence abilities, only 28% of general counsel indicated emotional intelligence was a priority leadership skill they felt they'd need in the future.

Emotional intelligence — the interrelated emotional and social competencies and behaviors that determine how well we understand and express ourselves, comprehend and relate to others, and cope with daily demands and challenges — is an area Loeb has found numerous lawyers, to become effective leaders, need to improve.

"Emotionally intelligent communication will increase the connection with others on the team and make them feel valued," she says. "Lawyers demonstrate emotional intelligence with their clients, but not necessarily with people



internally at the firm. Could it be raised? Most likely yes, since they have the patience and ability to ask clients great questions and wait for answers. They can practice that form of communication internally."

HELPING FIRM MEMBERS GIVE GUIDANCE

Firms that emphasize leadership skills have seen results. Nearly two-thirds now appoint practice leaders based on their leadership capability, rather than seniority, popularity or other factors — which has resulted in a significant performance improvement for more than 61% of firms, according to Altman Weil's annual survey.

The particular techniques law firms and legal departments utilize to help employees develop their leadership skills can vary. A survey conducted by TheRemsenGroup in 2019 found 40% of firms provide leadership training for current and future firm leaders; 37% report that type of training is in the works.

However, a separate survey the organization conducted in 2018 revealed only 6% of leaders feel the their firm is offering excellent leadership training and development; the majority, 73%, rate it as fair or poor.

"The mindset needs to eventually shift from the secretary who grew into the role to people going to school for this," Jakovenko says. "ALA offers a lot of professional development opportunities; it's up to us as a collective community to get that message out — administrators should be the ones taking the profession to the next level."

Whether it involves courses, mentoring or another method, the skills can be taught, according to Murphy, as long as there's a willingness to improve.

"Some companies take leadership communication classes to work on skills such as how to say no in a diplomatic way," she says. "Peer mentoring within or outside of the company [can be helpful] — or a spot mentor, someone you just want to speak to for 15 minutes to a half-hour about navigating the politics at the company."

When Loeb first began working with attorneys, she found individual instruction could help break down some of the barriers that can be involved in leadership learning.

"In one-on-one coaching, lawyers could reveal their own strengths and weaknesses; they were willing to become more self-aware," she says. "As they began to understand the benefits of learning new ways to communicate effectively and give feedback in a constructive way, they would notice associates were more willing to listen and apply the feedback they were given."

In addition to personalized instruction, experience can help test leadership skill development progress, according to Esposito. He has a basic rule for firm employees who come to talk to him about a problem — they need to be ready to discuss at least two solutions.

"I have people who are fully capable far beyond what they were doing simply because my predecessor didn't provide time for training people," he says. "One of the things I've done is basically challenge every one of them to step out of their comfort zone. They've really responded well to that."

If you've already been appointed to a leadership role and become concerned at some point you lack a certain skill,

"Learning is a continual process; the people who welcome that and are willing to embrace change and be self-reflective are the ones who are going to be in the best position. We all have skills we could take to the next level."

Murphy recommends asking a trusted colleague to assess your performance in high-pressure meetings, which can help you stay consciously focused on acting as a leader — and find out if you were successful at it.

"You can get immediate feedback," she says. "It's a technique I've used, and used with other people; it really does change the way you're viewing the situation. I like to write out by hand how I'd like the conversation to have gone, and what I wish I would've said; it starts to embed in your brain."

Embracing that type of improvement-focused attitude can help ensure leaders — or leadership candidates — within law firms and legal departments succeed at managing both the operational aspects of their role and the employees who report to them, according to Murphy.

"People sometimes feel because they have certain skills and have gotten to a certain point in life they don't need to learn," she says. "Learning is a continual process; the people who welcome that and are willing to embrace change and be self-reflective are the ones who are going to be in the best position. We all have skills we could take to the next level." ■

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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ALA Association of Legal Administrators

CONNECT TO THE ALA RESOURCE HUB FOR THE INFO YOU NEED

This year has been much different than any of us could have anticipated. But #ALAisHere and ready to adapt to help you through it. While we won't be meeting officially in person for the Master Class: Critical Skills for Legal Management Success in Nashville, ALA is still committed to providing you ample opportunities to access professional development and continuing education.

A great place to start is the Legal Management Resource Hub (*alanet.org/resource-hub*). We've got a hub dedicated to each of area of management: Legal Industry/Business Management, Human Resources Management, Financial Management, Communications and Organizational Management, and Operations Management. There are also hubs for the essentials where you can develop a more comprehensive perspective and sharpen your knowledge in any of these areas. Find everything from opportunities to earn continuing education credit to related articles from past issues of *Legal Management*. Plus, you can access our COVID-19 and diversity and inclusion pages here, too.

CHRISTINA FLOYD &
KAREN LEASTMAN
First American Legal Finance

Finding the Right Lease Type for Your Firm

To drive growth in a highly competitive market, players in the legal industry must innovate. To support the needs of innovation, law firms need to maintain up-to-date technology, modern office spaces and secure data centers. Of course, these initiatives are large investments that may take away from partner distributions or other cash management strategies.

To overcome these concerns, law firms have turned to lease financing as the solution. A lease allows firms to preserve cash, maximize partner distributions, gain predictability, pay less than the cash price for equipment and avoid obsolescence. However, leasing is not a one-size-fits-all approach — there are multiple types of leases to help with specific business objectives. When you consider leasing as the funding source for your next project, here are three questions to ask to find the right strategy for you firm:

1. **How do you plan on using the equipment during the lease term?** Knowing the use of the equipment will allow you and your leasing provider to understand how long you plan on using it.

2. **What is the equipment life at lease end?** This will allow you to think about a resale value and the depreciation of the equipment and understand the desired ownership.

3. **What are your firm's tax and accounting objectives?** Understanding what your firm is trying to accomplish with the project will help lead you to the right lease option based on your unique tax and accounting objectives.

Once the firm's objectives are understood, you can look at the following lease options to determine the best fit for your next project.

A lease allows firms to preserve cash, maximize partner distributions, gain predictability, pay less than the cash price for equipment and avoid obsolescence.

FAIR MARKET VALUE LEASE

If your firm is looking to purchase computers, copiers, servers or other short-term assets, consider a Fair Market Value (FMV, Rental or True) lease. This rental lease provides a low monthly payment and a built-in refresh cycle that works best with assets you may look to replace in three to five years. This option can provide cost savings because you are renting the equipment for less than the cash purchase price. It also offers you flexibility: if your plans change at lease-end, you still have the opportunity to return or purchase the equipment.

FIXED PURCHASE OPTION LEASE

Another option is a Fixed Purchase Option lease. This lease type is similar to the FMV lease in that it provides a low monthly payment, but it fits well for both short-term and long-term assets such as financing office buildouts. Firms can distribute the cost of the equipment or buildout per partner per year and align lease payments with the tax benefits partners receive. At lease-end, there is the option to purchase the equipment for a predetermined fixed price or extend the lease for a short-term period and then allowing you the option to return. This provides you more flexibility in your future choices.

$1 BUYOUT LEASE

If your firm is looking for financing option to spread out the costs of longer-term assets or soft costs like software implementations, consulting fees or professional services, explore a $1 buyout lease. This structure is designed similar to a bank term loan but has less requirements and provides fixed-rate financing at competitive rates. Financing these capital investments can help your firm increase cash reserves for strategic initiatives and ensures budget consistency with predictable payments. At lease-end, you will have long-term ownership of the equipment for $1.

Lease financing provides a strategic fixed-rate tool for all capital projects, IT hardware and software, furniture, buildout/renovation costs and professional services fees. Firms looking to preserve cash, maximize partner distributions, gain predictability and avoid obsolescence turn to leasing as a strategic way to accomplish their business objectives. If your firm has a project on the horizon, evaluating the project and understanding the different types of leases available to you will help you find the right lease for your firm's investment. ■

ABOUT THE AUTHOR

Christina Floyd is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully earned a Legal Management Finance Specialist Certificate from ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 200 firms.

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Karen Leastman has more than a decade of equipment leasing knowledge and dedicated experience working with the law firm industry. Since joining First American in 2003, she has been a key contributor in building First American's law firm division which now serves more than 200 law firms across the United States, including Am Law 100 and 200 firms. As a Certified Lease and Finance Professional (CLFP), Leastman is a leader in the equipment leasing industry.

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TUNE IN FOR MORE TIPS

As law firms continue to grow and merge, the question of office space and configuration is critical to legal management professionals tasked with operations — especially in the time of COVID-19 when office spaces might need to be rethought. In an episode of *Legal Management Talk*, Christina Floyd and Karen Leastman sat down to discuss options for financing your office remodel: *bit.ly/383GICw*.

ERIC DEWEY, MBA
Owner, eLegal Training

6 Strategies to Make Your Business Development Training More Effective

On average, law firms are losing $74,100 in revenues per lawyer each year. Today, lawyers are billing nearly 160 fewer hours than they did a dozen years ago, according to a recent state of the industry study by the Thomson Reuters Legal Executive Institute and the Center for the Study of the Legal Profession at Georgetown University Law Center. Many factors are driving this stark reality, but a less-discussed cause is the state of the training and coaching that firms use to build their business development capabilities.

While there is a renewed focus on business development in general, there is less of a focus on the training and learning required to assure its success. A recent eLegal Training survey of 30 large law firms found myriad challenges and inefficiencies in the current state of business development training. At eLegal Training, we took those findings — and our own experience reviewing and designing business development training programs — to recommend a number of steps law firm leaders can take to improve the quality and effectiveness of their own programs.

Before designing a training program, perform a needs assessment to identify the unique training requirements of each main practice area in the firm and the lawyers targeted for the learning.

FIRST, CONDUCT A TRAINING NEEDS ASSESSMENT

Before designing a training program, perform a needs assessment to identify the unique training requirements of each main practice area in the firm and the lawyers targeted for the learning. Identify and map out the practice area's unique business development methodology and processes, and then design the training program to those specifications. Then, survey learners for how they want to learn, how they want to access the training and what mediums they prefer to be trained through. Deliver the training in the modalities that the various learners prefer.

UNDERSTAND DIFFERING METHODOLOGY AMONG PRACTICES

Practice areas emphasize different strategies that work best to attract their particular clients or win engagements. The litigator's dilemma — the idea that you can't encourage a company to get itself sued — is an example of how marketing a litigation practice differs from marketing a transactional practice. The urgency of the need for legal services and whether the solution is optional for the client affects the business development process.

For instance, legal solutions may disrupt business processes, which requires internal stakeholders to weigh in on the decision. Whereas a major lawsuit may not require much consensus — the company must respond — an acquisition or a change to a contract can require more internal review before the decision is made to hire a lawyer. Understanding this decision-making and designing the business development training to accommodate the client's informational needs and decision process will make the training much more effective for the lawyers in each practice area.

INCORPORATE INSTRUCTIONAL DESIGN INTO YOUR TRAINING

Instructional design simplifies learning for students. Through careful planning, it identifies the critical skills required and the easiest and most effective ways to teach that information. As a result, the learning process is shortened, objectives are met more easily and resources are optimized. Good instructional design improves the return on your training investment.

Too often, law firm business development training programs don't undergo a rigorous instructional design review process. The specific skills required to accomplish the learning objectives may not have been identified, nor were the proper instructional techniques — exercises, quizzes and case studies — incorporated to ensure the skills are taught.

Frequently, we see training that has not been sequenced into logical learning paths where higher-level skills build on lower-level skills. Instructional design also requires that the program clearly state how outcomes will be measured, an important component to build support and demonstrate results for the investment.

PROVIDE MULTIPLE TRAINING MODALITIES TO APPEAL TO DIFFERENT LEARNING STYLES

The majority of training in law firms is done in one-hour, lecture-style workshops, typically created in-house and mirroring the style ingrained by law school. But successful programs deliver training through multiple mediums, such as podcasts, videos or e-learning in addition to lectures. Also, putting the training online allows learners to access the information whenever they need it. All of this enables people to take advantage of the training in a way that works best for their unique learning style and preferences.

Your training program should accommodate the seven different learning styles. Most learners tend to prefer one or two over the others, and their preference can change over time. If your learning style is …

- **Visual (spatial):** You prefer using pictures, images, videos and spatial understanding.
- **Aural (auditory):** You prefer using sound as in listening to a podcast.
- **Verbal (linguistic):** You prefer using words, both in speech and writing. Verbal learners learn best by reading.
- **Physical (kinesthetic):** You prefer using your body, hands and sense of touch to experience new information.
- **Logical (mathematical):** You prefer using logic, facts, reasoning and systems-thinking to learn new information.
- **Social (interpersonal):** You prefer to learn in groups or with other people.
- **Solitary (intrapersonal):** You prefer to work alone and use self-study.

INCLUDE POST-TRAINING REINFORCEMENT IN YOUR PROGRAM

Reinforcement is how you transfer information from short-term memory to long-term memory. It happens when you provide strategic content as a follow-up to help the brain recall and reuse information. Doing this several times helps to transfer that information to long-term memory.

Reinforcement should focus on the most critical, block-building information. Most learning professionals advise that reinforcement occurs immediately after the training, again a few hours after, two weeks post-training and again after four weeks. This repetition and engagement will multiply the retention of the information.

Types of post-training reinforcement content can include everything from quizzes and surveys to emails with statistics, tips and techniques related to the materials.

INTEGRATE AND ALIGN COACHING WITH BUSINESS DEVELOPMENT TRAINING

Coaching and training are not an either/or proposition. You need both — and lots of them. But too often, one or the other is missing or not fully utilized. The biggest problem, however, is that the two are rarely integrated. This results in two or more methodologies being taught, resulting in conflicting priorities and divergent strategies.

A well-designed training program can improve the retention and application of the training tenfold. And that translates directly into the revenues and profitability of the firm. Without it, you might as well forget about training because, well, it'll be forgotten anyway. ■

ABOUT THE AUTHOR

Eric Dewey, MBA, provides marketing and practice development consulting, business development coaching and training, e-learning and course development and instructional design to law firms throughout the United States. As the former chief marketing executive in several large law firms and a consultant to dozens more, he has successfully coached hundreds of lawyers to help them focus their practice, build competitive advantage and attract profitable clients. With Quimbee.com, he launched eLegal Training, LLC, an online business development training, coaching, resource and referral community for lawyers, at the start of 2020.

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502-693-4731

Congratulations to ALA's 2020 Award Winners

Every year at our Annual Conference, we honor the stellar accomplishments that our members have done in the last year to advance the legal management profession. We weren't able to gather in person in Salt Lake City to recognize these individuals and chapters on stage like we usually do, but we still want to highlight the work they have done on behalf of ALA and our profession.

On behalf of the entire ALA Board of Directors and everyone with ALA, we congratulate you on these achievements. You help make ALA such a strong community.

Please join us by giving them all a (virtual) round of applause!

OUTSTANDING ASSOCIATION VOLUNTEER

Each year, ALA identifies members that have made significant contributions to ALA. In most instances, these contributions extend over several years and at more than one level of our organization. As you might guess, there are hundreds of members who have contributed greatly in terms of time and effort. This year's recipients are:

DeAnna L. Lopez, CLM, SPHR, SHRM-SCP

White & Case, LLP
Houston, Texas

DeAnna joined ALA in 2000 and became involved in chapter leadership shortly thereafter. In fact, she has served as a leader for two chapters — Orange County and Houston.

Deanna's volunteer journey at the Association level began in 2014 when she joined the Annual Conference & Expo Planning Committee. She served on the 2014 and 2015 planning committees and chaired the committee in 2016. She also served on the committee that planned the Business of Law Conference in 2016.

In 2016, DeAnna was appointed to serve as a Regional Representative and stayed active in that role through the transition from Regional Leadership Teams to the current Chapter Resource Team. Her service on the Chapter Resource Team ended in May 2020.

According to another volunteer: "DeAnna exemplifies the volunteer spirit, and her service over a long period of time demonstrates true commitment to the organization and its members." We couldn't agree more — congratulations, DeAnna!

DeAnna L. Ouderkirk, CLM, MBA, SHRM-SCP

Sheppard Mullin
San Francisco, California

DeAnna joined ALA in 2001 and, a few years later, was appointed to serve on the Board of the Golden Gate Chapter. That's all it took to begin her volunteer career at the chapter level, where she has since held at least eight different titles spanning over a dozen different terms.

In 2014, DeAnna joined ALA's Certification Committee where she served as its Chair from 2018 through May 2020, when her term came to an end. During this time, she was instrumental in working with headquarters staff and the committee in creating the first Strategic Plan for the Association's Certification strategy, which was recently reviewed and accepted by the ALA Board of Directors.

"Volunteers and HQ staff alike praise her conscientious, diligent, insightful, hardworking effort and leadership," says another volunteer. Our sentiments exactly. Congratulations, DeAnna, and thank you for your efforts!

Mark S. Tallent

Farrar & Bates, LLP
Nashville, Tennessee

Mark joined ALA in 2007 and has since served in a variety of volunteer roles within the Middle Tennessee Chapter.

Mark's involvement at the Association level began in 2014 when he stepped up to serve on the Business of Law Conference Planning Committee; he went on to serve as its Chair in 2015. He also served on the committee that planned the Corporate Law Symposium in 2014 and 2015, as a Regional Representative from 2016–2018, and on the Nominating Committee from 2018–2019. Mark's service continues to this day as he is currently a member of the Business Partner Relations Project Team.

Another volunteer notes: "Mark is a humble leader and volunteer and embodies the spirit of service, and I look forward to seeing where he will next find a way to contribute to the success of ALA and our members." Our thoughts exactly. Congratulations, Mark — we can't wait to see what you'll do next!

IDEA AWARDS

ALA's IDEA Awards program seeks to recognize initiatives that model innovation, development, engagement and advancement in the legal community.

The contest is open to ALA chapters, committees, individuals, law firms and business partners. The program does not restrict participants to predetermined categories, allowing them to "think outside the box" in terms of what initiatives can be submitted. Check *alanet.org* to view videos of this year's recipients:

ALA Association of Legal Administrators | New York City Chapter

"Diversity Newsletter, *PRISM*"

Contact: Jenniffer Brown, jbrown@wmmblawfirm.com

The **New York City Chapter** established its diversity and inclusion committee in 2013. But this committee went further than the legal management-oriented education, resources and community building expected of it. The committee decided to create a newsletter solely dedicated to diversity and inclusion topics — even going so far to make it free of ads. After extensive research and the forming of an all-volunteer project team, the *PRISM* newsletter was born in 2015. The first edition enjoyed immediate success, gaining record readership and being shared at ALA events and by ALA publications, chapters and business partners. The publication has only grown more sophisticated in the intervening years, serving as a model for other chapters and member firms. Perhaps the most unique aspect of *PRISM* is that it does not just analyze diversity and inclusion issues as they relate to the workplace — it also studies historical trends and celebrates the vibrancy of the community through write-ups about cuisines, cultural events, holidays, media and more.

"Introducing the Professional Journey Support Group"

Contact: Rose Jaworecki, *rose.jaworecki@thompsonhine.com*

The idea for the **New York City Chapter**'s Professional Journey Support Group was sparked in 2018 when then-President Jenniffer Brown heard from a chapter member who felt like persona non grata due to her unemployment status. Jenniffer realized that the tenured professionals within the chapter could be sharing the highs and lows they had experienced in their own career journeys to help members — particularly the historically disadvantaged — who were currently at a low point caused by job loss, underemployment or personal issues. Members Francine Lahm and Rick D'Aversa were deputized to develop the Professional Journey Support Group, which would be in line with the chapter's Mind, Body and Soul vision for its programming and networking. The group evolved to serve various "clients," such as someone looking for a sounding board to evaluate opportunities, someone in need of résumé assistance and interview support to find a new job, or someone transitioning to retirement. It combines empathetic support, practical advice and the power of professional networks to help members find their path. ALA business partner Loeb Leadership lent their expert input in 2019 to sharpen the group's mentoring, which the New York City Chapter considers "priceless" and true to the spirit of the ALA community.

Orange County
A Chapter of the Association of Legal Administrators

"OC-ALA Mobile

Contact: Donna Bustos, dbustos@ggtriallaw.com

The **Orange County Chapter** of ALA rolled out its very own mobile application in August 2019. It centralizes and streamlines the communications and resources found on OC-ALA's website, but in a user-friendly interface that's easily accessed from the phone or tablet of a current member or business partner. The app, which is available for download in the Apple and Google stores, features a newsfeed, event calendars, newsletter archives and galleries. Additionally, there are directories for chapter leadership, members and business partners to make it easy to connect. Users can even opt in to receive push notifications for important alerts and reminders. Although OC-ALA is still evaluating the full impact of the app, anecdotal evidence already points to improved awareness and engagement. From an administrative perspective, the BiznessApps-powered program was easy to use and was affordable. It comes with 24/7 support and the ability to display business partner logos and ads, providing yet another perk to support the chapter-business partner relationship.

ELEVATE ALA AWARD

The Elevate ALA Award seeks to recognize chapters whose efforts in professional development, networking and visibility demonstrate advancement in the areas of educational content, member-to-member and member-to-business partner relationships, and ALA's prominence in the legal community. This year's recipients are:

In the span of a year, the **Chicago Chapter** offered over 55 educational and networking sessions, providing its members with invaluable information and the opportunity to enhance connections with peers and business partners. These efforts are well-rounded, utilize a variety of formats, and — with the exception of the biannual educational conference offered by the chapter — are all included in the price of chapter dues.

The chapter is home to an outstanding Certified Legal Manager (CLM)® study group that offers two full study programs each year at no charge to its members, and also provides a stipend for all chapter members who pass the CLM exam.

This chapter not only focuses strongly on educating its members and providing ample opportunities to network, but also on increasing its visibility within the legal community by inviting other affiliated legal groups such as the Legal Marketing Association, the International Facility Management Association and the International Legal Technology Association to participate in its activities.

Please join us in congratulating the Chicago Chapter on all of its outstanding efforts!

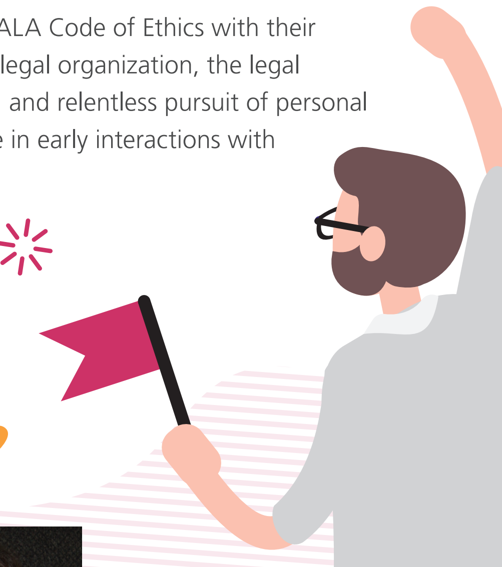
The Western & Central New York Chapter (WCNY) held its first annual chapter conference in 2019. This event was attended by 70% of the chapters members as well as by many nonmembers, business partners and managing partners. It concluded with a robust networking gathering.

Despite meetings held regularly in Rochester, the geographical area covered by this chapter presents an ongoing engagement challenge. To address this challenge, the chapter began hosting group videoconferencing in nearby Buffalo and Syracuse. Lunch is provided as part of each meeting at all locations. This enhanced learning experience provides the interactive and networking components all members crave.

The chapter offers its members scholarship opportunities to attend ALA events and sends two board members to the Chapter Leadership Institute each year. Please join us in congratulating the Western & Central New York Chapter on all of its outstanding efforts!

NEXTGEN LEADER AWARD

The NextGen Leader Award recognizes members who embody the essence of the ALA Code of Ethics with their accomplishments, leadership qualities and the impact they are making within their legal organization, the legal industry, and the Association. These individuals demonstrate conviction, dedication and relentless pursuit of personal and professional excellence through their engagement, advancement and influence in early interactions with the Association of Legal Administrators.



Timothy J. Hardin
Cesari and McKenna LLP
Boston, Massachusetts

Tim began his career in law firm administration in 2015. He's only been a member of the ALA and Boston Chapter since late 2016, but chapter leaders indicate he has already demonstrated a relentless dedication to the chapter, the Association and the legal profession. In his brief time as a member, Tim has already been the driver behind several successful chapter initiatives. Shortly after getting involved with the chapter, he joined the Community Engagement Committee and currently serves in his second year on the Boston Chapter's Board of Directors. He is energetic and resourceful, full of ideas to promote the chapter's involvement and visibility in the community, and inclusive of everyone who has ideas and/or the desire to get involved.

Another chapter member states: "Without a doubt, Tim has made a big impact on the chapter and our involvement with the local community in his very short time as a Boston Chapter member, and we know this is only the beginning of much more to come."

Congratulations, Tim!

Cheyenne Hunter
Fullenweider Wilhite
Houston, Texas

Cheyenne first joined the legal industry as a temporary assistant, but her value was quickly noticed — her firm promoted her to a permanent full-time accounting assistant position within a very short time. Shortly after joining the Houston Chapter as a new member herself, Cheyenne volunteered to join the Houston Chapter's Membership Committee. Soon after, she took on the role of Chair.

Upon the departure of the firm's Administrator, Cheyenne was promoted to the position due to her drive to get the job done. This is an accomplishment her firm recognized was owed to Cheyenne's resourcefulness and dependability. The chapter has also seen these qualities in her volunteer efforts. She has repeatedly demonstrated her ability and eagerness to learn, to teach, and to lead change and progress by adapting new processes at her firm as well as within the Membership Committee.

Congratulations, Cheyenne!

Ernie Jaseckas

Robbins Salomon & Patt
Chicago, Illinois

Ernie began his new role as Executive Director at Robbins, Salomon & Patt in April 2017 and quickly realized he needed to join ALA and the Chicago Chapter (CCALA). He's already made significant contributions to CCALA and its membership in this short time. A regular participant at the chapter's Executive Director/CEO Roundtable meetings, Ernie offers as much knowledge and information as he receives from these lively interactions. He was a very involved member of the chapter's biannual Educational Conference Committee last year and provided valuable insight into educational content and commenting on attendee experiences that would make a difference — particularly to first-time attendees. Because of his management experience in other professional service companies, Ernie has also become an alternative voice of best practices to consider from outside our field of practice.

Among his many contributions is the creation of the chapter's "Under 5" special interest group. This program brings together members new to the legal industry who have fewer than five years' experience — or anyone who wishes to expand their networking/mentorship opportunities — to share knowledge and experiences.

Congratulations, Ernie!

Jeff Johnson

Sheppard Mullin
Palo Alto, California

Jeff joined ALA in 2015 and, after a period of familiarization, became a great force within the Golden Gate Chapter. He first participated in a Build a Bike for Foster Kids event where the chapter ordered, assembled and delivered about 20 bikes for kids transitioning in the foster care program. Another chapter member Linda Belcher says, "As President, I needed two new Co-Chairs for the Finance section. Jeff accepted my nomination and put together three exemplary educational programs, including one on the responsibilities in the escheatment of property and one on partner compensation. They were worthy of anything a seasoned Co-Chair had done."

Jeff quickly became known as a person who not only accepts new projects, but also delivers on his promises. Jeff is currently serving as the chapter's Treasurer and has become the epitome of a highly contributing member of the chapter, spreading good will along the way while motivating others.

Congratulations, Jeff!

Hannah K. Lincecum

Reed Smith LLP
San Francisco, California

Hannah manages and leads HR functions for Reed Smith LLP across the California market. She has been a member of the Golden Gate Chapter for four years and is currently the Director-at-Large. She is also serving as the Conference Chair for the chapter's 2020 Knowledge to Leadership Conference & Exposition (K2L).

As the K2L Conference Chair, Hannah has implemented innovative and creative approaches to marketing the conference, including producing a video that featured members of the K2L Committee and the Chapter President sharing their past K2L experiences. She was also interviewed on the *Law Firm Marketing Catalyst* podcast, where she highlighted the content of the K2L educational sessions as well as the business partner expo portion of the conference. In selecting speakers and topics, Hannah pushed the committee to think unconventionally, beyond what was done at past events. She stressed the desire that speakers, topics and attendees be diverse and appeal to as many people as possible, including members, prospective members, nonmembers, business partners and outside vendors. Chapter member Jackie Hughes says: "Hannah drives the K2L Committee to work hard, respectfully keeps us on task, all while having fun."

Congratulations, Hannah!

Emily C. Spehar

Fox Smith, LLC
St. Louis, Missouri

Emily joined the Gateway Chapter in 2017 and became immersed instantly. She became a member of the Strategic Alliance Committee right away and advanced to the Co-Chair position by 2018. She served as Co-Chair of Membership in 2019–2020 and is currently the chapter's Secretary.

Emily is focusing on the recruitment and engagement of early career professionals and has taken the initiative on her own to communicate the importance of building a pipeline of future members. As a young professional herself, Emily is passionate about inclusivity, promotes collaboration and reminds us where prospective members can be found. She has represented the chapter in local college career fairs and talks to students about prospective careers in legal management. She has also worked with college career centers to invite students as guests to a chapter meeting.

Not long ago, Emily reminded the chapter's Board that it should not discount the value paralegals could bring to the chapter as members. As a result, ALA Gateway has strengthened its relationship with the St. Louis Paralegal Association and identified potential leaders from that specific member pool.

Emily is an active, engaged member who volunteers for nearly every special project and event. From a career perspective, Emily is also respected at her firm. She started at the firm as a paralegal student and advanced rapidly to her current role as Office Manager. She has provided ideas that increase efficiencies and is not afraid to initiate new concepts.

Congratulations, Emily!

Angela Viehland, CAPM

Shook Hardy & Bacon L.L.P.
Kansas City, Missouri

Angela joined ALA in November 2018 because she had recently become more involved as a project manager in the IP section at her firm. She was looking for a community of like-minded professionals and found that in ALA. Angela had previously attended an Intellectual Property Conference and enjoyed the experience; however, she thought that the conference attendees needed and wanted more.

That prompted her to become involved and apply to serve on the IP Conference Planning Committee for 2019. Angela joined the committee and through a series of circumstances became the Chair in her first year of service! The committee talked to members, business partners and headquarters staff to understand the challenges, opportunities and wishes for this small, yet highly valued, conference. What they heard and learned help them to reimagine the conference. Feedback from conference attendees was positive; members left feeling energized about this group and more well connected to a peer community that has quite different needs and challenges than the average ALA member. The IP Committee worked together as a team with ALA HQ staff to achieve these results. However, Angela's enthusiasm, leadership and creative approach helped to move the concept from the whiteboard to execution.

Congratulations, Angela!

PRESIDENTS AWARD OF EXCELLENCE

The Presidents' Award of Excellence is a performance guideline named in honor of all our Past Presidents. It is used to encourage chapters to take effective and collaborative action in support of ALA's mission to promote and enhance the competence of legal management professionals, improve the quality of management in law firms and other legal service organizations, and represent professional legal management and managers to the legal community and to the community at large. The following chapters received this distinction:

Alamo
Albany
Arizona
Arkansas
Atlanta
Austin
Boston
Calgary
Capital
Central Florida
Chicago
Columbus
Cyber
Dallas
Downeast
East Bay
First State
Fort Worth
Gateway
Golden Gate
Greater Cincinnati
Greater Kansas City
Greater Los Angeles
Hampton Roads
Hawaii
Houston
Independence
Indiana
Jacksonville
Knoxville
Las Vegas
Maryland
Metropolitan Detroit
Middle Tennessee
Mile High
Minnesota
Mobile
New Jersey
New Mexico
New Orleans
New York City
Northern Virginia
Nutmeg
Oklahoma City
Orange County
Oregon
Palm Beach County
Philadelphia
Pittsburgh
Puget Sound
Raleigh/Durham
Richmond
San Diego
Silicon Valley
South Florida
Suncoast
Tulsa
West Michigan
Western and Central New York
Wisconsin

60 SECONDS OF FAME!

Participants in the *60 Seconds of Fame!* contest use their personality, unique ideas and creativity to produce a video testimonial telling us why they value their ALA membership or relationship. Just as the contest was kicking off, we began to feel the impacts of coronavirus on, well, everything.

Nevertheless, we did receive one entry in this year's contest — from the New York City Chapter — and it's too good not to share: *bit.ly/60-seconds-of-fame*. Excellent work, New York City Chapter!

ALA Association of Legal Administrators

ALA'S EDUCATION

A Great Value to Fit Your Schedule

No matter what legal management specialty area applies to you, ALA offers online education live and on-demand at very affordable prices.

Webinars

ALA offers more than 30 live webinars each year on a wide veriety of legal industry topics. Each 60-minute session is available both live and on-demand.
alanet.org/webinars

Online Learning

e-Learning and Web-Based online learning courses. Get dynamic education in the style that best suits you and your goals.
alanet.org/elearning and alanet.org/web-based-courses

Podcasts

Legal Management Talk is the official podcast of ALA. Episodes are available through *alanet.org/podcast* and syndicated through iTunes. No subscription required!
alanet.org/podcast

Conference Recordings

Recordings from past ALA conferences are available to view on-demand, many of which are free to members.
alanet.org/recordings

alanet.org/education/online-learning

ALA's 2020 Annual Conference & Expo Exhibitors

We didn't get to meet in Salt Lake City this year, but we still wanted to acknowledge and thank all of our business partners who had signed up to be there with us.

VIPs

LawPay
ABA Retirement Funds Program
Affinity Consulting Group
Affinity Insight
Allied World
BreachPro
GLJ Benefit Consultants
GLJ Financial
iSolved
LTC Solutions
National Purchasing Partners
NextPath Legal
Principal
Teladoc
VIBE

GOLD

Fulcrum GT
Konica Minolta Business Solutions U.S.A., Inc.
Royal Cup
Worldox

SILVER

Centerbase
Coyote Analytics
Filevine
Foxit Software
milliCare Textile & Floor Care
Orion Law Management Systems
SurePoint Technologies
Vital Records Control
ZERØ
Zola Media

BRONZE

Accusoft
Aderant
Agility Recovery
Aimactek
AskCody
BigHand
Citizens One
ClientPay
ContactEase
The Elegant Office
Elite Limousine Plus
Epiq
EPONA USA
EPSON America
GilsbarPRO
Innovative Computing Systems
Integreon
Intelliteach
Iridium Technology
Loeb Leadership
The MCS Group
PerfectLaw
ProVantage Software
QuickBooks Online Advanced (Intuit)
Traveling Coaches
WALZ
Western Union Business Solutions
ABA Preferred Rate Hotel Program and ABA Leverage
Access
Adams & Martin Group
Afinety
Aimactek
ALL-STATE LEGAL
Ask My Gurus
Attorney Insure
Bevi
BirdEye
Chetu
Chubb Insurance
Clear Guidance Partners
Clio
Confirmation
Connoisseur Travel
CoreTech Leasing
Corporate Care
CORT
Curo365
Cushman & Wakefield
DFM
DocOps – Document Operations
DocSolid
DocuLogix Inc.
Element Technologies
Experient
FinOp Group
First Legal
Frosch Travel
Gallagher
GB Collects
Grubhub Corporate
Account
Headnote
Humanscale
IA Interior Architects
iManage
inMailX by Digitus
Invoice Prep
Jaffe
Jaxxon Promotions
JEMS Hospitality Group & Maui Jim Sunglasses
JuraLaw
KENECT
The Kimberly Hotel New York City
Krug
LawToolBox
Lawyers Choice, LLC
Lawyers Travel (Ovation Travel)
Levit & James
LexisNexis
Litera Microsystems
LMT Technology Solutions
Lucas Group
Marsh Wortham
Micron Systems
Momentum Search Partners
Monify Legal
MyCase
Nationwide Legal
NBI, Inc. – National Business Institute
NELSON Worldwide
NetDocuments
nQueue
Olympus America
One Legal
PacerPro
PCLaw | TimeMatters
Perfect Practice
Podium
PremierOffice.ca
Procirrus Technologies
QuickFee
Reliance Information Consulting
RingCentral + Time Miner
Robert Hadley Associates (Howard Sloan Search)
Robert Half Legal
Savvy Training
ScanSnap (Fujitsu)
SmartAdvocate
Soluno
SpeakWrite
Spoonful of Comfort
Streamlined Record Retrieval
Systems Auditing Inc.
Tabbies
Tabs3 Software
Travel and Transport
Ultramar
Virtual Independent Paralegals, LLC
WAMS, Inc.
XCHAIR, LLC