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ALA Mission Statement:
The Association of Legal Administrators’ mission is to promote and enhance the competence and professionalism of all members of the legal management team; 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.
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Paper or Digital: Your Choice

One of the many benefits of your Greater Chicago Chapter membership is receiving our bi-monthly newsletter, the ADMINISTRATOR’S ADVANTAGE. Beginning with the May/June 2013 issue, we are offering an opportunity to “go green” and “opt out” of the printed copy of the newsletter being mailed to you. Recipients who “opt out” will receive an email notification once the digital version of the newsletter is available for download from the Chapter’s website, along with a link to the newsletter.

If you’d like to “go green,” please send an email with “request to opt out” in the subject line to ala_optout@crayhuber.com.
From the Editor

Technology. Now there’s a word that makes me cringe most of the time. I have been responsible for all things IT in my small law firm for the last six years and can finally say that I convinced the owners that I needed to have some assistance in this regard. Enter a great IT consultant who has taken a huge burden off my shoulders and helps me with the day-to-day tasks as well as forecasting future ideas/needs for the firm.

Some of us have more responsibility in this area than others, but we all know how critical technology is to the running of our firms. In this issue we have several helpful articles on such topics as IT security, making a decision on laptops vs. tablets, travel technology, managed print options, and scanning solutions.

Also in this issue we have some updates on what your fellow members are doing for their summer vacations, and be sure to test your knowledge in the “Got CLM?” section.

As always, I hope you enjoy this issue and please feel free to send me any contributions you may wish to make for future issues. Enjoy the rest of your summer!

Mary Lynn Wilson, CLM
Legal Administrator
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Technology: I have a feeling we’re not in Kansas any more, Toto.

Technology. I can think of no other area that has impacted the practice of law and the management of law firms in the way that technology has. As I think back, I am struck by how much has changed since my career in legal began. I hope you’ll indulge me in a walk down memory lane.

• Like many of you, I saw the rise and fall of fax machines. Does anyone remember fondly that roll of thermographic paper?

• I experienced the migration from DOS to Windows, amazed that we could operate more than one software application at the same time.

• I remember when color monitors replaced black-and-white monitors. It was like Dorothy stepping out of her black-and-white Kansas home into the wonderful, colorful world of Oz.

• I suffered through that fateful time when the legal industry was forced—kicking and screaming, I might add—to embrace Microsoft Word as its default word processing software. How would we live without WordPerfect’s reveal codes?

• I witnessed the introduction of the Internet in business, when establishing a website was once something firms debated the merits of doing at all. Now, websites are not only a standard marketing fixture, but firms are incorporating audio, video, and other online interactive marketing tools.

• I’ve watched the migration from live, person-to-person communication to electronic communication (which ironically requires everyone to have a basic proficiency in typing—a skill once deemed unnecessary for professionals and required only of those in clerical positions).

On my trip down memory lane, I am keen to remember only the positive and more efficient outcomes of the technology introduced then; I don’t quite remember the pain. I’m sure many of you can relate. But knowing what we know now about all the wonderful ways in which technology has influenced our lives, why is it that some of us still cringe when we hear the word “upgrade” or when a new technology is introduced?

What is both awe-inspiring and challenging about technology is that its complete trajectory and impact cannot entirely be predicted. Technology is dynamic and fluid—always evolving to adapt to ever-changing needs and consumer demands. This fluidity carries with it uncertainty, and this is often the challenge we face when adopting and managing it. We don’t always know what we don’t know, and this can be hard in an environment where we’re expected to know everything!

The impact of technology affects us even more deeply than our attempts at managing the unknown. Though I would never tout Wikipedia as a premier source for information, I did read with interest the following on its “Technology” page: “Technology can be viewed as an activity that forms or changes culture.” It’s true, isn’t it? Technology affects our culture on many levels: personally, professionally and as a society. And, if you accept the premise that technology affects culture, then by definition technology often has to overcome bias. As Legal Administrators, it is incumbent upon us to push beyond all biases, including our own, in order to fully serve the needs of our organizations.

Let me set the scene for what I’m sure is a conversation many of us have had at some point:

Caller 1: “So, I was thinking…what are your thoughts about creating a Facebook page or a LinkedIn page for our organization?”

Caller 2: [eyes roll, with inaudible sigh] “I really don’t think either is necessary. After all, we have a website! Everything we want to share about our organization is on our website. Aren’t we just going to post the same things on Facebook and LinkedIn as we do on our website? It just seems like a duplication of effort to me.”

Since I’m among trusted friends, I’ll share with you that this conversation isn’t a figment of my imagination created to illustrate how most technology is “embraced” in our organizations. It is an actual conversation that took place a little over three years ago.

President’s Message
Three-plus years ago, a wise, forward-thinking Greater Chicago Chapter President (Carol McCallum) suggested to her fellow board member—the then Communication/Website Director—that we consider embracing these new media outlets as additional avenues of member communication and outreach. Would you like to venture a guess as to the identity of that whiny, short-sighted board member? You guessed it! Yours truly: I’m Caller 2.

Why did I react this way? Back then, I had a strong, negative bias against social media. I thought social media was a waste of time. I didn’t understand the appeal, nor could I comprehend the power and influence that social media would ultimately make on our personal and professional lives. Back then, social media was a disruption in my view of how the world should work—a disruption of my culture—so the mere suggestion of introducing a Facebook or LinkedIn page for the Chapter was simply unpalatable. Unfortunately, I allowed my personal bias to be bigger than the needs of the organization that I served.

As you have no doubt seen via our Chapter listserv, the Chapter is planning to embrace a social media presence this year. It’s ironic that we’ll do so now, especially when I was so vehemently opposed to it just a mere three years ago. Karma is funny that way. Introducing a social media presence is one of the Chapter’s “small bets” this year, and we’re very excited to see how introducing this technology will impact our Chapter’s culture. Will we end up somewhere over the rainbow? The exact future is unknown. But, one thing is for sure: I have a feeling we won’t be in Kansas any more!  

P.S. I would be remiss if I didn’t mention and encourage attendance at our upcoming Greater Chicago Chapter Educational Conference & Expo on Friday, September 13, 2013. The educational line-up is absolutely outstanding! Of particular note, and apropos of this article, is Wayne Breitbarth’s session, “Power Formula for LinkedIn Success.” Would you like to venture a guess as to at least one of Wayne’s session attendees? You guessed it: yours truly! Hope to see you there!

Deb

My name is: **John Gilbert**

I work for: *nQueue Billback*

The company’s product or service is: document management, cost recovery and making scanning easier.

The company has: offices in Phoenix, London and Sydney

My title is: Senior Vice President, Americas.

Before becoming a business partner to the legal market, I was: in college; I have supported and sold to law firms for the last 30 years.

I entered the legal market because: law firms understand the need for professional services to help them advance and meet their goals.

I have a degree: Bachelor of Science in Computer Science.

I support ALA because: law firms become members to share knowledge with each other and other business partners.

To be successful in the legal market, one has to: be an expert in what you do. In the last 15 years, law firms have hired significant IT resources and share ideas better than ever. To be successful, a business partner must provide additional knowledge and services the firm does not have internally.

The thing I like best about being a business partner to the legal market is: I understand and appreciate lawyers and law firms. Each firm has a unique personality; understanding the firm, its personnel and goals makes working with each firm a different experience -- no two firms are exactly the same.

The best advice I have received is: be honest about what you know and can do for a firm.

The best advice I would give to someone just entering the legal market is: understand how firms work before you meet with them.

I try to motivate myself and/or my staff by: making the most of each day.

Three things I do well are: (1) try to share my knowledge, (2) enjoy what I am doing at any given moment and (3) cook a fabulous meal.

While I love my current job, my dream job would be: a SCUBA instructor somewhere in the Caribbean.

The last good book I read was: *The Summit* by Eric Alexander.

The last good movie I saw was: *X Men, Wolverine*.

The last vacation I took was: two weeks ago I went SCUBA diving with my wife, son and daughter.

In my free time, I: spend time with family.
Using Technology to Manage Travel

By Beth Andrew

If your firm is working with a Travel Management Company (TMC) for individual reservations, you may have an online booking tool such as Concur, Egencia or GetThere. Work with your TMC to ensure that any preferred hotel rates are loaded in the online tool. That way, the TMC may access and book the rates on your behalf, and have them available on the tool for your employees to book themselves or the people they support. If your firm is not working with a TMC, most hotels and hotel companies are able to create a booking link or a code to directly access your preferred rate at their brand.com site.

In addition to individual travel, groups of 10 or more can be booked directly through many hotel websites by answering questions about dates, number of rooms, and any meeting space and catering requirements. Once a contract is signed, the hotel would then create a link for attendees to book themselves, or else rooming lists can be uploaded instead of manually entered, reducing the possibility for error.

Of course, no amount of technology can replace that one-on-one relationship with your local hotel sales professional. Squeezing a room in on a sold out date, special requests for VIP’s and promotional events are some of the things that can be gained from a personal contact. Maintain a balance between the two for the most successful and efficient relationship!

If you negotiate a rate locally, share it with offices in other cities. Hotels base discounts on volume, so the more business you can drive to your preferred hotel, the more leverage you will have in negotiating rates and concessions. If your firm has an internal website, post the information there, so locations that may be visiting your office have quick access.

Beth Andrew is the Business Travel Sales Manager at the Renaissance Blackstone, rated the #6 Hotel in the Midwest by Conde Nast Traveler in 2013. Built in 1910 and reopened in 2008, the Blackstone also features Iron Chef Jose Garces’ Mercat a la Planxa, serving Catalan cuisine.

Beth, along with the rest of the team, focus on providing individual attention to clients and guests of the hotel. Beth can be reached at beth.andrew@theblackstonehotel.com.
According to last year’s ILTA Technology Survey, 34% of law firms do not use scanner workflow software to automate the scanning process from their multi-function devices. Without workflow functionality, attorneys and other professionals are forced to scan their documents and simply email them back to themselves, which clogs email servers, or temporarily place them on a shared drive, which is not secure or efficient. By eschewing a uniform scanning strategy, with workflows and protocols supported by technology, firms are exacerbating their “paper problem” and not gaining the type of effectiveness available from scan functionality.

For years, the “paperless office” has been the Holy Grail for technology-focused law firms. However, at the same time, the amount of paper most firms house has actually grown. The result is that information is harder to organize and find. Paper stored onsite is expensive, since the firm pays as much per square foot for paper as it does for a partner and is at risk to flood, fire or earthquake. Paper stored offsite is also expensive, not only to store but also to retrieve when necessary.

While firms see the obvious rationale behind scanning more and retaining less paper, the idea of going completely “paperless” has proven to be too much for many firms. A sound strategy is one we term the “Hippocratic Strategy,” based on the line in the oath that physicians historically have taken: “First do no harm.” This strategy is implemented by simply no longer sending any documents to offsite storage. Any new documents that need to be stored are instead scanned and stored electronically, ideally in a document management system. Any documents that are retrieved from offsite storage are also scanned rather than returned. Because 10-15% of documents are sent to and from offsite storage each year, the Hippocratic Strategy will immediately freeze offsite storage needs and reduce them substantially over time. However, such an approach requires a lot of scanning from a lot of locations and a lot of organization; it requires a uniform scanning program.

In order to maximize the benefits from scanning, a firm must be able to effectively handle both “bulk” and “walk-up” scanning. Bulk scanning involves big piles of paper ready for scanning, for example, boxes of paper as they are retrieved from offsite. This work is typically best done in the “back office” by the facilities management team. Walk-up scanning is usually related to active work product that is needed currently. Legal professionals and assistants usually handle it in the “front office” by simply walking up to the local MFD and scanning.

With a firm requiring both bulk and walk-up scanning, and different levels of expertise, sophistication and willingness to “buy in” among the everyday scanners, it is crucial that the firm create a uniform scanning solution regardless of hardware brand or model. All must have the same interface and experience, with multiple options to determine destination and output format. Electronic court filing must be supported, and scanning technology should easily integrate with a document management (and/or records management) system.

To achieve uniform scanning, the firm should have a common platform across any MFD brand that supports both bulk and walk-up scanning. Users should have the option to “tag” the document for routing or decide right at the MFD at the touch of a button. Best practice is to scan directly to a specific destination in a document management system, but the user should also be able to scan directly to email or a network folder, or fax directly to any number of recipients. All the above can be accomplished through standardized workflows with scanned documents automatically routed to their final destination without additional steps.

In addition to reducing storage costs, uniform scanning can unlock value for a firm from its paper documents. Documents can be accessed better and work can be collaborated on more
effectively. Also, more information enables better decision making, allowing attorneys and the firms themselves to make fewer decisions based on instinct and more based on data in order to improve outcomes for clients and also productivity and efficiency throughout the firm.

Furthermore, a unified scan protocol allows firms to better recover the scan costs. According to the same ILTA survey, more than 30% of firms now charge for scans, an increase of about 25% from 2008. An integrated approach helps clients see the value of scanning, making them more likely to accept cost recovery for scans.

Finally, scanning is essential for firms, as most courts now require electronic filing of documents. Not surprisingly, each court and government agency has its own rules about file type, maximum file size (and how to split bigger files), naming conventions and whether optical character recognition is required. This absence of standards and changing rules makes it imperative to keep track of the variety of requirements. All the requirements are much too detailed to cover here; however, firms can understand them better by downloading our white paper, “Scanners Beware: A Guide to Scanning to PDF for Electronic Case Filing” at http://www.nqbillback.com/dyn/formwall/scanners_beware.

Many firms start each year by promising to reduce paper throughout the firm. They understand the extra cost, inefficiency and risk caused by excess paper. But the complexity of “paperless” means that these initiatives typically never reach the top of the to-do list. A uniform scanning strategy, when supported by the right technology, can be simple enough to use (for all involved) and enable the firm to immediately put a stop to the increase in paper quantities, and over time, reduce the amount of paper the firm retains.

John Gilbert is Senior Vice President at nQueue Billback. He has more than 20 years experience in selling to and supporting law firms throughout the United States. He was formerly Vice President at PerfectAccess Speer, where he helped to pioneer the methodology used to customize Microsoft Word for the legal environment including the awareness and removal of metadata in documents. John has been published in Law Technology News, Peer to Peer, Legal Management and National Law Journal.
### Upcoming Events

#### SEPTEMBER

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**Sept. 11** – 12:00 PM – 1:00 PM  
Small Firm Meeting  
Golan & Christie LLP  
■ 70 West Madison Street, Suite 1500

**Sept. 13** – 7:30 AM – 5:00 PM  
Greater Chicago Chapter One-Day Educational Conference & Expo  
The Fairmont Chicago  
■ 200 North Columbus Drive

**Sept. 18** – 1:00 PM – 2:00 PM  
Webinar: “Forecasting the Realistic Budget”  
Barack, Ferrazzano, Kirschbaum & Nagelberg, LLP  
■ 200 West Madison Street, Suite 3400

**Sept. 19** – 12:00 PM – 1:00 PM  
Mid-Size Meeting  
Duane Morris LLP  
■ 190 South LaSalle Street, Suite 3700

**Sept. 19-20**  
IP Conference for Legal Professionals  
■ Gaylord National Resort & Convention Center  
National Harbor, MD

**Sept. 26-28**  
Large Firm Principal Administrators Retreat  
■ Four Seasons Resort at Troon North, Scottsdale, AZ

#### OCTOBER

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**Oct. 9** – 12:00 PM – 1:00 PM  
Small Firm Meeting  
Levin Schreder & Carey Ltd.  
120 North LaSalle Street, 38th Floor

**Oct. 10** – 12:00 PM – 1:00 PM  
Finance Brown Bag  
■ Location TBD

**Oct. 16** – 1:00 PM – 2:00 PM  
Webinar: “Saying the Hard Things with Aloha”  
DLA Piper  
■ 203 North LaSalle Street, Suite 1900

**Oct. 17** – 12:00 PM – 1:00 PM  
Mid-Size Firm Meeting  
Epstein Becker & Green  
■ 150 North Michigan Avenue, 35th Floor

**Oct. 24-26**  
ALA Regions 1 & 3 Conference & Expo  
Renaissance Cleveland Hotel  
Cleveland, OH

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**Nov. 13** – 12:00 PM – 1:00 PM  
Joint Small/Mid-Size Firm Meeting  
SmithAmundsen LLC  
■ 150 North Michigan Avenue, Suite 3300

**Nov. 13** – 1:00 PM – 2:00 PM  
Webinar: “The Ethics of Email and Social Media”  
Masuda Funai Eifert & Mitchell, Ltd.  
■ 203 North LaSalle Street, Suite 2500

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**REGISTER NOW** for the Greater Chicago Chapter Educational & Exposition Conference at The Fairmont Chicago for Friday, September 13, 2013 – open to non-members, too!
At a recent bi-monthly meeting, the Chapter presented the Israel Idonije Foundation with a check in the amount of $16,533.01.

We would like to congratulate all of our chapter members who helped make this event such a huge success. We would also like to congratulate Jane Klenck on winning the raffle for a dinner with Israel Idonije. A good time was had by all.

Casino Night Update

Patrick Johansen, CLM, CPP

Director of Business Development with Brinks Hofer Gilson & Lione

For the award he received from the International Legal Technology Association for:

• Best Member-Contributed Magazine Article

• Recognized for: June 2013 Peer to Peer, Law2020: “Law Firm, Meet CEO”
In June, the Greater Chicago Chapter invited its members along with their managing partners to a Law Firm Leaders Breakfast featuring financial consultant Kent Zimmermann discussing current trends in the legal industry and the implications of those trends. In preparation for this bi-annual event and in order to make the presentation more interactive and insightful, the Chapter, with Zimmerman’s guidance, had distributed a member survey asking what members collectively saw on the horizon in 2013 and 2014. Zimmermann incorporated the results of this survey in his discussion. Based on his work in advising leading law firms on their growth strategies, he offered an inside view of the common themes in the evolving strategies of top performing firms in Chicago, nationally, and globally. He provided practical insights on firm billing rates, what practice areas are forecasted to be in demand more than others, and what separates the strongest firms from the rest of the pack.

Citing a January 15, 2013 Citibank/Hildebrandt Report, Zimmermann explained that in 2011-2012, law firms saw more intense pricing pressure, the emergence of non-traditional legal service providers, and continuing efforts to right-size firms by cutting chronically underproductive partners. Many firms turned their focus to their branding, their recruiting tactics, and their quality of service to combat declining productivity. Firms also confronted a sharp decline in realization which fell to 88 percent in 2011-2012 from 94 percent previously. The reason for the decline: increased client demand for heavier discounting. Lastly, 2011-2012 saw law firm leadership resetting expectations as single digit profit growth became the norm and volatility became increasingly common, with the number of firms failing between 1987 and 2007 (18) almost doubling in the last five years.

Zimmermann went on to discuss the Am Law 100 and Am Law 200 results for 2012, pointing out the different strategies and divergent results of the two. While the Am Law 100 saw only a .8% increase in headcount, a 2.5% growth in non-equity headcount, and a flat equity headcount, the Am Law 200 saw a 3% increase in total headcount, a 10.1% increase in non-equity headcount, and a 1% increase in equity headcount. Surprisingly, the moderate improvement in law firm profit margins were actually impressive compared to most Fortune 500 industries, and the Am Law 200 have clearly recovered from the recession. The largest firms, driven by brand strength, are outperforming the industry. To finish up with his 2012 recap, Zimmermann reported on the demand for legal services by practice area, explaining that in 2012 litigation practice areas remained flat while labor and employment, along with corporate practices, were more in demand. Bankruptcy, IP litigation, and tax and real estate practices, on the other hand, were less in demand.

Having established this historical context, Zimmermann turned his attention to projections for 2013, 2014 and beyond. According to the Greater Chicago ALA Member Survey, about 85% of those who responded are somewhat or very optimistic about the future of their law firm. Overall they see an increase in attorney headcount for 2014 along with an increase in billing rates, and an expanded use of contract attorneys/LPOs (Legal Process Outsourcing) as more clients refuse to pay for first and second-year associate “training.” As to talent, 57% say it is harder to become an equity partner while only 22% indicate that it is getting harder to remain an equity partner. Seventy-one percent predict that the market for talent will tighten in 2014, and 95% foresee that the market for clients will become more competitive. Lastly, 33% of responding firms say that their firm has a formal written strategic plan and 77% of those who do not believe that it would be beneficial.
Zimmermann’s predictions? The years 2013 and 2014 will be anxiety-ridden years of choice for many firms who will have to make hard decisions to grow financially or become complacent in the “fat middle.” The hard decisions will include shedding lower rate practices, establishing higher expectations of partners for hours and books of business, along with shrinking the non-equity tier while maintaining no growth in the equity tier. If a firm does not evaluate these decisions, then good talent will go to more competitive firms and clients will leave to go to these firms.

So what separates the strong from the weak? Firms weaken, as have 10-20% of Am Law 200 firms, when they have overcapacity, are not known as the best or at least among the best at core areas of practice, or when they lack breadth/depth in those areas. Firms that continue to be strong relentlessly focus on key clients and client relationships, and choose a limited number of markets in which to concentrate their energies. Those markets could be one or a combination of practices, geographies and industries, but are areas where the firm can be the best, or among the best in those markets. The difficult task for firms is making those tough decisions and eliminating the practice areas that do not fit within the firm’s defined “markets.”

Among the 2013 “Accelerating Trends” or trends on the rise in law firms, according to Zimmermann, are law firm “combinations” (previously referred to as mergers). Firms combine for many reasons including to grow core markets, to double their strengths, to serve clients more broadly and to increase gross revenue and strengthen brand. As a result of these combinations, firms are also broadening their reach: local firms are becoming regional, regional are becoming national, national are becoming international and international are becoming global. And what of the Chicago market? Zimmermann explained that Chicago is a hot market, poised to become the second most competitive city in the US by 2025. Based on a 2012 TyMetrix report, Chicago is one of only six US cities to already command the highest attorney billing rates. The Windy City is also ranked the third largest legal market in the US by the National Law Journal, is home to four of the top 10 AM law firms, and is home to 7,745 lawyers working in 350 firms.

Where does Chicago stand in the global marketplace? Zimmermann explained that according to the June 2012 McKinsey Global Institute Study, we are realizing the urbanization of the world’s population and the re-balancing of the global economy. Law is a “follow the money profession” and the money is shifting. China is leading the re-balancing of the world’s economy. By 2025, Asia, Latin America, and Africa will account for two-thirds of the global GDP. The impact of globalization on US practices leads to a bright future for US litigation. About 75% of the world’s legal spend remains in the US, of which 40% is spent on litigation. Investment by global markets in real estate, energy and companies of all kinds in the United States will increase the corporate practice area needs as well.

Finally, Zimmermann revealed the fastest growing trend which was “taking off like a rocket ship”: Legal Service Providers. LPOs are now seen as having the competitive advantage because they win on both price and quality. They are seen as a viable alternative to expensive associates, and therefore many clients are starting to ask their firms to work with LPOs, and in turn firms may cut associates as a result. LPOs are starting to do more sophisticated work, thereby increasing their offerings to clients. As such the “conventional” law firm is rethinking their service delivery model along with how best to allocate work to lower the cost of delivering legal services. Clients are asking for alternatives in getting the work done at reduced rates and with the same quality expectations or higher.

In summary, Chicago will continue to be a top contender in the legal market. Now it is a matter of how your law firm will stay competitive. Will you merge so your firm enters the national market? Will your firm add new practice groups to remain competitive, or will your firm decide to minimize the number of equity partners? Will your firm see the potential of forming a relationship with an LPO, thereby reducing overhead for the firm and costs for the clients? There is no better time than now to review the firm’s business strategy or to develop one, then take the steps to successfully meet those strategies.

Law Firm Leaders Breakfast
Webinar Recap

Marketing (Mis) Alignment:

Closing the Gap Between Marketing and Law Firm Leadership

By Mary Ann Rojas, CLM Pugh, Jones & Johnson, P.C.

On Wednesday, May 15, 2013, ALA webinar “Marketing (Mis)Alignment: Closing the Gap Between Marketing and Law Firm Leadership” was hosted by Karen Hammersmith of Levin Ginsburg. The webinar was conducted by Marcie Borgal Shunk and Michael Rynowecer of BTI Consulting Group.

BTI conducted a survey from members of both ALA and LMA (Legal Marketing Association) to gain a better understanding of how law firm leaders and law firm marketers think about marketing, and how they measure marketing success and return on investment. Although the two organizations do not always agree on the most effective marketing/business development approaches, the following points were noted:

- Nearly 40% of ALA members reported having no metrics in place for marketing and business development; the number is about 25% for LMA Chief Marketing Officers
- Growing revenue is the top measure of ROI by both ALA and LMA members
- Both groups agree that face-to-face client activities deliver the highest ROI
- Both groups also agree that educating and training attorneys on the importance of marketing is a critical component of a successful marketing plan

BTI offered the following roadmap to improve marketing and business development:

- Gain attorney buy-in; it’s hard to make magic happen when you don’t have buy-in and support from the management committee
- Improve and expand marketing staff, if you have the resources available to you
- Communicate your goals, and do so on a regular basis
- Apply specific, targeted client goals

Winning support is not always easy. Here are a few tips:

- Measure your successes
- Take a look at the five-year revenue trend for your top 100 clients
- Measure your net effective rate (total hours worked divided by total revenue) by client and practice
- Flag warning signs, such as client defections and turnover, in top 25 clients

Planning your marketing strategy is fundamental. By establishing specific targets for each attorney, client and practice group, you can create detailed step-by-step action plans that can be tracked and measured. Incorporate timelines and key milestones in your strategic planning, and spread the word about your successes through an internal firm newsletter. In doing so, you will cultivate a marketing culture and demonstrate your plan’s effectiveness to your entire firm.
Leveraging Technology

By Maureen T. Feltman, CLM  Brady, Connolly & Masuda, P.C.

On June 19, 2013, Epstein Green hosted an ALA webinar on “Leveraging Technology” for Small Firms presented by Debbie Foster of Affinity Consulting. Everyone is always looking to save a few dollars to increase their bottom line. Ms. Foster suggested names of websites that may provide cost savings for IT-related items, from hardware to software. Another way to save some dollars is to maximize the use of your firm’s current technology.

Bargains can be found on various websites but when is a bargain a bargain? When shopping for the best value you need to identify the players, find out what the technology critics are saying about the products and find out the condition of the product (is it refurbished and worth the risk?), when analyzing the costs. Make sure you remember to include shipping and sales tax. Even when you think you have the best deal, you can check on the web for discount codes or just pick up the phone and inquire if there are any additional discounts. It can’t hurt.

Knowing the value of the technology you own is another way to save. Complete an inventory of your software and get your employees trained. Remember that there are users at all levels so let’s not let them just stumble upon the way to use the software. My favorite tip is the one that I have noted IT uses – just “Google” how to do it. It can provide a wealth of knowledge on Microsoft features.

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Warehouse Direct ... a “One Stop Shop” Resource. Full Range of Business and Legal Products; Coffee & Breakroom Products & Services; Furniture & Interior Design; Full Recycling Services and more.
As more and more attorneys, paralegals and even legal assistants start to bring their own devices into the legal environment, more pressure is being placed on the IT infrastructure to identify, standardize and adopt the devices that best fit the corporate environment and users. Typically the best chosen devices will facilitate productive, secure, and, for mobile users, anytime/anywhere access to the corporate environment while still allowing them leisure activities. This includes providing users with the ability to easily access their client's data and line of business (LOB) applications in ways that will lead to huge improvement in their productivity gains and revenue generation.

Over the last 12-18 months, there has been a huge proliferation of tablets, notebooks, ultra books, and even smart phones to the devices marketplace. During that period of time, Microsoft has added to the chaos by introducing the Windows 8 platform. This move has forced typical Windows OEM desktop and notebook vendors to innovate and to increase their hardware support to include faster, sleeker, and built for touch devices across their portfolio of desktops, notebooks, ultrabooks, and tablets.

With so many options to choose from, it is no wonder it may be difficult to determine what device is the right fit for you. In any given environment, you could easily encounter entry level tablets such as the Microsoft Surface RT, Apple iPads, Google Android, Amazon Nook, Blackberry Playbook, Motorola Xoom, Samsung Galaxy, and the list goes on. As you can see, the tablet has taken the marketplace by storm, but so has the choice of the more advanced enterprise ready devices that include more robust tablets, notebooks, and ultrabooks.

Even as you try to narrow the pool of devices by limiting it to the ones that perform tasks that are typically associated with a PC, you will still have a long list of hardware choices thanks to vendors such as Lenovo, Dell, ASUS, Toshiba, HP, Acer, Samsung, LG, Sony, etc.

In the past, a tablet was looked at as filling the void between a PC and phone to provide users with a larger screen to check emails, watch movies, and play games. The ultrabook was looked at as a full-fledged PC in a thinner, lighter form factor. Fast forward to today and you will see that the landscape has changed and the lines have blurred between a tablet, ultrabook and a notebook. You now have advanced tablets, called convertibles, which rivals the capabilities of ultrabooks and notebooks. These convertibles will provide you with many of the features you need to be productive and include things such as keyboards, mouse support, USB support, touch capabilities, etc.

**The Decision:**

So how do you decide which tablet, ultrabook or notebook is best suited for your users and your environment?

1. Your first challenge is to define the business requirements that these devices will need to meet. Typical business requirements include reducing cost, creating ease of use, increasing productivity, and creating seamless remote connection to the corporate environment and LOB applications while still having the consumer-based capabilities users love.

2. The next challenge is meeting the technical requirements. These requirements are typically focused on obtaining lightweight devices with small form factor, identifying devices that are ruggedized, identifying devices with exceptional performance, maintaining or improving security, and making sure there is sufficient manageability.

3. Lastly, you will need to conduct a detailed user profiling exercise to define the various use cases and map the users to the appropriate device based on their needs. The use case assessment will explore how users use their systems. This exercise may also determine whether a Virtual Desktop Infrastructure (VDI) and/or published applications are right for your environment.

The above 3 challenges in making a decision may vary from environment to environment as the business and technical requirements may be different. Below are some sample requirements you can use as a starting point.

**Identifying the Business Requirements:**

1. Reduction in cost typically entails reduced cost in purchasing, support of the devices, and reduced cost associated with downtime. The business would need to define where it makes sense to implement these cost cutting measures.

2. Ease of use means making the use of the device seamless. Learning how to use the device should be very intuitive for the users.

3. In order to successfully meet the business requirement of increased productivity and seamless remote connection to the corporate environment and LOB
applications, it’s important to provide users with the ability to securely access key LOB applications that will perform functions such as document creation, document review, e-discovery, property research, litigation holds, etc. The best option to provide seamless access to LOB applications from the entry level tablets listed above is leveraging a solution such as “Citrix Receiver,” “Quest vWorkspace,” or similar solutions. These solutions will provide anytime/anywhere/any device access to your applications or virtual desktop environments in the data center.

4. The more advanced devices will include the notebook-like devices, which are a huge improvement over traditional notebooks. The ultrabooks are also proving themselves to be just as thin and light as the tablets while keeping the features that many users love about the notebooks, i.e. keyboards, track pads and multiple USB ports. These advanced devices will provide the user with the full desktop/laptop experience with their LOB applications without having to remotely connect into the data center.

5. Consumer capabilities provide the user with the ability to perform daily activities they would often do at home such as surfing the internet, participating in social media, shopping online, or using apps that are made for non-business needs.

Identifying the Technical Requirements:

1. The weight and ruggedness of the devices are very key because users don’t want to have to carry multiple devices for different purposes anymore, but want the flexibility to have a single lightweight, rugged device that can stand up to their everyday use.

2. Users have gotten used to using the iPads over the years where they get the instant on, instant access experience. As a result, users now expect their applications to be instantaneously available and provide speedy performance in launching and using applications.

3. The security of the chosen device needs to meet the security requirements of the business. Introducing the use of these new devices should not compromise the security of accessing the corporate environment.

4. In addition to providing adequate security, IT will also need to be able to manage the chosen devices to ensure the requirements are continually met. In addition, devices need to be inventoried, patched, supported, etc.

Conducting the Use Case Assessment

The use case assessment will explore how users use their systems, identify applications that they typically use, identify the heavy duty applications being used, identify users that are task workers vs. knowledge workers, identify mobile vs. static users, etc. If you have made the decision to implement VDI and need to determine which devices you should obtain, you can gather the necessary details using a tool such as Liquidware Lab’s Statusphere to assist in creating a detailed report of how users are using their systems.

Conclusion:

Making the decision on which type of device is best suited for your users is not getting any easier. In fact, it will require learning a larger portfolio of devices that are now being offered by each vendor as you look to make these decisions.

To be effective at choosing the right device, it is highly recommended that you first define your requirements so that they can be used as your guide during the decision-making process on what is best suited for your environment and your users. You should also determine user needs to define who will just need to read email and surf the internet vs. someone who will be working in the document management tool, and using applications such as Adobe, Summation or Concordance.

For the entry level tablet devices, it’s recommended to use a third-party solution such as Citrix Receiver in order to make them effective in the corporate environment. In fact, these entry level devices could potentially double as a thin client and a tablet. Advanced tablet and ultrabooks or the hybrid devices called convertibles can be used interchangeably based on defined business and technical requirements. These devices are often effective as productivity devices since they can run LOB applications locally and are full-featured. In addition to being sleek, slim, lightweight, and fashionable, the convertibles are also powerful. As a result, the notebook as we know it may become a thing of the past unless there is a need for a more powerful configuration. These powerful configurations may include additional ports, larger screens, larger keyboards, optical drives, CD/DVD, removable batteries, higher graphic cards, larger hard drives, more memory, and other features to make it an adequate desktop replacement.

Gordon Dunkley is a founding member of Project Leadership Associates (PLA), and the National Practice Lead for the Enterprise Windows Services team. He possesses over 19 years of law firm information technology experience covering all aspects of a project lifecycle including envisioning, planning, development, deployment and operations of technology. During his 19+ years in IT, he has worked with firms ranging from very small to some of the largest. This has provided him with the exposure to different environments, users and architectures. He can be reached at Gdunkley@projectleadership.net.
Social Media

Social Media Tops the List of Networking Preferences  By Kirby Grossman

In today’s digital world, it may not come as a surprise that social media seems to have become the professional’s preferred means of networking. But even if social media is the networking tool of choice, interactions appear to be driven by more than mere social reasons. Almost half (45 percent) of senior-level executives interviewed for a Robert Half survey said they prefer to cultivate business relationships via sites such as LinkedIn, Twitter and Facebook over other options. One-quarter of respondents indicated they favored in-person networking at events, meetings and conferences. A slightly smaller number (22 percent) said they prefer to network through email correspondence.

The majority of professionals (60 percent) said their primary purpose for networking with professional acquaintances is to grow business. Twenty percent said their business-related networking is geared toward following industry news or finding a job (10 percent).

Networking can, of course, be beneficial to both organizations and individuals. It can help law firms and corporations gain visibility and gauge new business opportunities. On a personal level, it can help legal professionals build their reputation in their local legal community.

As effective as online networking is in reaching a large number of contacts, it should not entirely replace more traditional approaches. Because most people still want some personal familiarity with individuals before doing business with them or making a referral, in-person interactions remain essential for developing meaningful professional relationships. Links built online can be viewed as breaking the ice, or kicking off this process, or, in reverse, a way to stay in touch with people you’ve already met in person.

In addition to combining online and in-person approaches, legal professionals may want to consider the following tips to get the most out of their networking experiences:

**Don’t wait until you need something.** If you reach out to your network only when you need help, you’ll be seen more as opportunistic than sincere. Be visible and keep in touch on a regular basis by commenting on your contacts’ updates, offering assistance and sharing information.

**Stay in the know.** Monitor social media to stay abreast of the latest industry developments and your network’s reaction to them. The information you gather from active discussions and shared perspectives is often more useful than what you can learn from more traditional media sources.
Mind your digital etiquette. Be especially aware of your tone when using social media and how your comments may be perceived in the online world. Remember that just because you’re buffered by technology, you’re not anonymous. What is intended as dry humor could easily be mistaken for sarcasm, and a tendency to weigh in on every issue might cause you to come across as a know-it-all. Always be professional, respectful and discreet when commenting on professional discussion boards and networking sites. A good rule of thumb: Don’t say something online that you wouldn’t say in person.

Strike the right balance. Connecting in person takes more time and effort than connecting online, but can deliver much more value over the long term. Develop relationships through one-on-one meetings and interactions with others at professional events and conferences. You can then use online networking to nurture these connections.

Even though online networking provides a highly efficient way to cultivate and maintain business contacts, it’s not a substitute for personal interaction with other legal professionals. Developing a strong network and a positive reputation in the legal industry still hinges on the quality of one’s relationships, and face-to-face meetings can build rapport in a way that electronic communication cannot. Continue to make time for tried-and-true networking methods such as get-togethers over coffee or lunch, mingling at professional events and personalized outreach to key contacts and prospective employers.

Kirby Grossman is Branch Director of Robert Half Legal, overseeing the Chicago office. Robert Half Legal is a leading staffing service specializing in the placement of attorneys, paralegals, legal administrators and other legal professionals with law firms and corporate legal departments. Based in Menlo Park, Calif., Robert Half Legal has offices in major cities throughout the United States and Canada. For more information, visit www.roberthalflegal.com.
Video Conferencing

The Benefits of Video Conferencing
By Ben Dixon

It’s a question every attorney has thought about. “This is 2013. I don’t want to fly halfway across the country for a two-hour deposition, but I don’t want to literally “phone it in.” What about video conferencing? Is that an option?”

Yes, it is. Video conferencing is the futuristic means of communication from “2001: A Space Odyssey.” However, 2001 was over ten years ago. What used to be possible only in a few high tech conference rooms is now cheaper, higher quality, and in more locations than ever.

There are a few options for video conferencing of which you should be aware. Depending on the circumstances, you may need higher quality video conferencing suites, or you may be able to get away with a simple Internet deposition though Skype or another video conferencing software.

Right off the bat, I should point out that no matter how good the quality of the video conferencing, for some attorneys, it won’t be enough. Some attorneys need the actual experience of being in the room with the deponent, to watch their body language when they aren’t sitting in front of the camera. That is a perfectly valid stance, especially for the most important depositions. In those cases, video conferencing technology will never come far enough, and you should fly to wherever your deponent is personally.

For everyone else, you have several options. Renting video conferencing suites is, by far, the highest quality option. Video conference suites offer the highest quality connection. It has the fewest dropped calls, the fewest skips and glitches, and the best audio and video quality available. If both suites have the technology, the call is broadcast in High Definition. Otherwise, it is usually DVD quality audio and video -- at worst VHS quality.

Video conference suites have the most reliable connection. On their own they are around 97% reliable. If there are any problems, a third party service called a “bridge” can boost the signal on both sides, making it 99.9% reliable.

In addition to being a safety net, a bridge can make it possible for multiple conference suites to connect to one another. If the deponent is in Chicago, your office is in San Francisco, and opposing counsel is in Milwaukee, a bridge can connect everyone seamlessly.

Finding a video conferencing suite used to be a chore. Unless you were in a major metropolitan area, your nearest video conference suite could be up to 100 miles away. As technology has gotten cheaper, suites have popped up everywhere, from college campuses to hospitals. Even in rural areas, most people are within 20 miles of a video conference suite. If you need help finding one, call your local court reporting company. Most will be happy to help you find a location, even if you don’t book the suite though them.

The downside to video conferencing suites is how much they cost. A typical suite will cost between $150-200 per hour, but remember, you need to rent two suites (unless you own one of the suites, or can use it for free). Between that, and the “line charge” (whoever dials out, usually between $40-60 per hour), you could be paying between $340-460 per hour. If you are doing an international video conference, the cost could be even higher.

This is where you have a decision to make, based on what is important to you. Depending on the duration of the deposition or how many people would be traveling with you, the answer may be obvious. If the video conference costs less than the cost of travel, it’s a hard option to ignore.

Very often, the cost of travel and the cost of the video conference are similar. In this case, don't forget, time is money. The time saved by going to a video conferencing suite near your office, versus the time spent traveling, is a
significant factor. In the amount of time it takes you to get through security in some airports, you could have finished the deposition and been back in your office. For longer trips, you could be cutting out two full days of travel by choosing a video conference.

In some cases, there just may not be any suites where the deponent is located. They may just be too expensive for a deponent that isn’t all that important. The deponent may refuse to travel to a video conferencing suite. Even today, there may just not be any where the deponent is. In these emergency situations, you can arrange for an Internet deposition using a webcam and video conferencing software, like Skype or LiveDeposition. While this is a cheaper, more portable option, you get what you pay for. Imagine taking a deposition over a bad cell phone connection. That’s the quality you can expect. There is no bridge to fall back on, no safety net. This option should only be used as a backup, but it is an option.

This is the state of video conferencing in 2013. Keep an eye out though, because as the technology gets better and cheaper, it’s going to become harder and harder to justify the cost of travel, when video conferencing is available at a fraction of the cost.

Ben Dixon is the Video Technology Administrator for McCorkle Litigation Services, based in Chicago. He is an expert in how technology is applied in the legal field. Since 2005, Ben has worked in every aspect of legal support, often using cutting edge technologies to find solutions to problems. Ben started his career in Hollywood as an actor, then got into the technical aspects of filmmaking, before settling in the legal field. You may contact Ben at: BenDixonVideo@gmail.com.

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**Daley Plaza**
May 16-October 31, 2013
Washington & Dearborn
Every Thursday
7 am - 3 pm
This market accepts the LINK card.

**Federal Plaza**
May 21-October 31, 2013
Adams & Dearborn (230 S - 50 W)
Every Tuesday
7 am - 3 pm
This market accepts the LINK card.

**Willis Tower Plaza**
June 27-October 31, 2013
Wacker & Jackson (233 S. Wacker Dr.)

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What have your fellow members been up to this summer?

Here is our version of “What I Did on My Summer Vacation.”

**Bill Donehoo** savored quality time spent with family, fishing pole, and Lake Michigan:
July morning...very early...trolling on Lake Michigan off Holland with nephew Jon and grandson Josh. Josh’s first big fish on big water. Good fights...with delicious results!

**Sheri Stone** also spent time on Lake Michigan, enjoying her firm’s annual summer boat outing:
Every summer Aronberg Goldgehn takes a dinner cruise aboard the “Summer of George.” Drinks, dinner and a cruise around Navy Pier is a great way for our different departments to mingle with our beautiful city skyline as a backdrop. We have an informal Hawaiian dress-up competition and the winners are announced via email the next day by one of our Managing Partners in a funny recap of the evening. Everyone loves the outing.

**Jane Klenck** enjoyed an old-fashioned family vacation in Florida:
I had a wonderful trip to Florida with my husband, all three of my children, and my oldest son's girlfriend, explored Miami, Melbourne Beach, and Universal Studios in Orlando. We had such a good time, we didn't even mind that it rained most of the time we were there. And even though Tropical Storm Andrea hit during our scheduled visit to Universal, we donned our ponchos, enjoyed the slim crowds (even at Harry Potter World!), and went on every water ride because we couldn't possibly get any wetter than we already were. It was a blast!

**Karen Hammersmith** spent the summer looking forward to a big birthday and exciting travel plans:
Who says getting older is a bad thing? My big 6-0 birthday is October 28th. To celebrate, my husband and I are going on an Alaskan cruise the first week of September, spending 3 days in Seattle, Washington pre-cruise. In October, I’ll be traveling to London and Paris for 10 days with my son and daughter-in-law. And on New Year’s Eve, my husband and I will fly off to spend five days in St. Thomas with my daughter and her family. So far, 60 is looking darn good to me!

**Laura Marlin** also looked forward to a big trip, compliments of her firm:
My firm is sending me and my family to Costa Rica for one week to celebrate my 25 years with the wonderful firm of Miller Shakman & Beem LLP. No internet – no phones – no worries!

**Marsha Thomas**, a celebrity in our midst, was featured on an Irish TV show and had a summer adventure abroad:
Because of my genealogy work over the past 20 years, I was asked to participate in the Irish version of “Who Do You Think You Are?” The show “Tar Abháile” (Coming Home) will be presented in both Irish and English on TG4 in Ireland during the Fall of this year. The documentary series is being produced by Red Pepper Productions with the assistance of Ireland Reaching Out. Twelve families from different continents with ties to different counties in Ireland are being highlighted. In May of this year, the production staff came to Chicago to interview our family and learn a bit about our lives in Chicago. At the end of June, we traveled to Knockainey, County Limerick, Ireland where we were “welcomed home.” We learned an enormous amount about the Cooke and Barry families and formed incredible new connections. A superb time was had by all!

**Jim Beavers** also had a family adventure abroad:
My family and I attended a good friend’s wedding in Berlin with side trips to the Baltic Sea and Poland. It was the kids’ first European vacation and they were troopers with the flights, new food, new language and hectic wedding schedule. Great time to be in Berlin, as it was the 50th anniversary of Kennedy’s ‘Ich bin ein Berliner’ speech. Both of my kids can now ask for their favorite ice cream flavors in fluent German.

Speaking of weddings, **Vivian Schroeder** traveled to Michigan in July to see friend and ALA Business Partner Relations Director **Laura Thomson** marry Business Partner **Mel Sears** of Gregg Communications. Talk about taking your Board position seriously! The reception must have been the ultimate networking event!

**Legal Levity**
**Legal Levity**

**Tech Word Search**

MSFSCLKSQELMXZGSGYOB
AMJAOIPODADXUZNNVLO
CAIWCFACBOPSFEOIDMN
NRFPYKTSXETCINHCQOO
HTDRAYBWHDOPMTNVT
VFLRODGAPPFNKVUEIHE
LHRZINGLORCBINOLRREB
BOTACVLIKEKTEXIOEURO
TRYSGMRENQCTAVGPSFSBO
SEPWLLAKVEEKHOCTNBOK
EPBJXERQTJDUYNODAK
BRYKNETDDLLHCHPGICZRA
ULAWYKIUNPEVISVRCYDI
YBAWATSNFCRBCLSFTTP
IRDROSNXNNSFVIPATGJ
TRENKRESZEURIRBEEAS
BKDDUBAJKPTVCLUDRMTD
HCTIMSEHKEE-CNASHY
MONITARREROETEIOWVSF
MALWARGRSSTLLLTWXA
KEYBOARDYYOZPFCELEHV
MFMHKYFPFDWSEYEKWFMQF

**Solution**

BLACKBERRY
CRASH
ETHERNET
HASHTAG
IPOD
LINKEDIN
MONITOR
PRINTSOLUTIONS
SECURITY
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TABLET
VIDEO

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CONFERENCE
EMAIL
CONFERENCING
DRIVE
EMAIL
FACEBOOK
HARDWARE
INTERNET
HARDWARE
IPAD
KEYBOARD
IPAD
LABTOP
MAC
MALWARE
MALWARE
MOTHERBOARD
NOTEBOOK
RAM
ROM
SERVER
SMARTPHONE
SPYWARE
SWITCH
TABLET
USB
TWITTER
VOIP

**LIFE BEFORE COMPUTERS**

An application was for employment;
A program was a TV show;
A cursor used profanity;
A keyboard was a piano!

Compress was something you did to garbage,
Not something you did to a file.
And if you unzipped anything in public,
You'd be in jail for a while!

Log on was adding wood to a fire;
Hard drive was a long trip on the road.
A mouse pad was where a mouse lived;
And a backup happened to your commode!

Cut – you did with a pocket knife;
Paste – you did with glue;
A web was a spider’s home;
And a virus was the flu!
Every business has two major management responsibilities – minimizing expenses and maximizing revenue. Firms can cut costs, but that’s the easy part. The greater challenge is mobilizing their lawyers to change their behavior in ways that will maximize personal and firm business development potential. Facilitating this culture shift requires a level of institutional effort, coordination and follow-through rarely found inside today’s law firms.

Anyone who has tried to change a culture knows it’s a monumental task. Impassioned speeches by firm leaders about increased cross-selling, better client service, more profitable clients and higher originations are never enough. True culture change requires a new breed of leaders who can encourage collaborative planning, change behaviors, revise systems, enhance skills, increase teamwork, implement supportive technology, align incentives, inspire colleagues – plus relentlessly drive implementation to get the right people moving in the right directions.

Getting Started – Collaborative Planning

If you’ve ever tried to jump-start business development in a firm, you’ve probably run up against a long laundry list of roadblocks – low motivation, siloed practices, dysfunctional groups, lack of trust, inefficient teams, ineffective leaders, poor communication, misaligned compensation, weak selling skills, unclear goals and measures, inconsistent client service, minimal accountability, and inadequate follow-through.

Along with these, no matter what firm cultural elements you want to shift, buy-in is required from those whose behavior you want to change. As you well know, you can’t just tell most lawyers what to do and expect they will automatically do it. They need facts. They have to analyze, dissect, and explore other approaches. Then – maybe – they’ll put their support behind a plan.

So from the get-go, engage your lawyers in a facilitated collaborative planning process and make them feel adequately involved in the decision-making process.

Not only will you achieve the planning outcomes you desire, you’ll also set the stage for better implementation of your plan.

The Need for the “Watcher”

Simply developing a plan is not enough. The most important and often most underrated part of any real change initiative is a defined process for driving ongoing implementation. For that, you need key stakeholders to understand their roles, develop clear action plans, and adhere to specific deadlines.

There’s another secret ingredient, too: Stakeholders must agree to be managed to their plans. This requires a “Watcher” – a person or group with real power to remind, cajole, prod, and hold people accountable for their commitments. Without this level of management, most plans are destined to fail. Therefore, your collaborative planning process should conclude with a frank discussion of the roles and responsibilities of all players – the leaders and the led. It should lay out policies and procedures and give permission to leaders to do what it takes to make the plan happen.

Become a Business Development Machine

The culture change process is a delicate dance that requires many different initiatives blending at the right time, and in the right way, in order to move people to
a higher level of performance. While details of how and when differ for every firm, the following are key elements any firm should consider if they want to become a more effective client development machine:

**Senior Leadership Alignment**
- Develop consensus on vision and goals
- Determine strategies, tactics, and priorities
- Determine major roles and responsibilities
- Agree on key measures
- Adjust compensation to encourage desired behaviors
- Develop tracking and reporting systems

**Client Surveys and Feedback**
- Prioritize clients
- Agree on a process and frequency of feedback
- Develop a formal process for acting on feedback received

**Client and Industry Teams**
- Identify high priority targets
- Develop team dynamics, standards, roles and enforcement
- Obtain client feedback
- Deliver exceptional levels of service
- Engage in structured cross-selling
- Increase market visibility
- Develop tracking and reporting systems

**Exceptional Client Service**
- Develop internal standards and specific best practices
- Provide ongoing training and refreshers
- Create a staff service committee
- Provide rewards and consequences that support desired behaviors

**Cross-Selling**
- Identify and overcome the common obstacles to cross-selling
- Build key internal relationships
- Align compensation system to encourage desired behaviors
- Focus on highest potential clients
- Train group leaders how to drive the process

**Lateral Integration**
- Develop a strategic acquisition plan
- Build a formal internal integration process
- Have laterals create a detailed client development plan
- Improve lateral selling skills
- Appoint lateral mentors who guide and provide accountability

**Business Development Planning, Training and Coaching**
- Identify and give support to high potential lawyers
- Provide best practices, specific tactics, and customized support
- Obtain personal commitments
- Develop a business development committee of associates to build for the future

**Sales Management Skills for Group Leaders**
- Encourage a culture of business development
- Provide appropriate power/authority
- Allow input on compensation
- Conduct group planning
- Develop buy-in and motivation in group members
- Drive cross-selling
- Develop the right goals and measures of progress and success
- Track and report on progress
- Provide ongoing training and reminders
- Work with other complementary practice groups to drive cross-selling

**Change is Hard – But So Rewarding**
Culture change is extremely hard work and requires an unprecedented firm-wide effort. The managing partner must become the Chief Sales Officer/Cheerleader/Watcher/Carrot and Sticker. Group Leaders must have the stamina and skills to drive focused action in their groups. Each lawyer needs to adopt new behaviors. This is on top of the legal industry’s long-embedded tradition of resisting sales and marketing.

Most firms are not ready for this kind of commitment, but those that do make the leap will become client-focused juggernauts, and prototypes for the successful law firms of the future.

David H. Freeman, J.D., a former lawyer and CEO of the David Freeman Consulting Group, is a renowned law firm management consultant who has shown thousands of lawyers at hundreds of law firms how to generate more revenue. He can be reached at dfreeman@davidfreemanconsulting.com, or 949-715-0819.
nQueue Billback’s iA captures all hard and soft cost data into a single database to improve profitability firmwide

**COST RECOVERY**
Maximize recoveries for both hard and soft costs

**COST MANAGEMENT**
Analyze cost and expense data to make better decisions

**COST CONTROL**
More information and better workflows reduce costs before they are incurred
“KEEPING A PULSE ON THE PRESENT...AND AN EYE ON THE FUTURE”

2013 EDUCATIONAL CONFERENCE & BUSINESS PARTNER EXPO
FRIDAY, SEPTEMBER 13, 2013

FAIRMONT CHICAGO - MILLENIUM PARK
200 NORTH COLUMBUS DRIVE, CHICAGO, IL

OPENING KEYNOTE: “SEE THE END FIRST” – BOB CRUMLEY

Bob Crumley lays out the Three Simple Yet Difficult Rules of Success in his new book and keynote speech, See the End First. He will entertain and challenge you as he weaves you through his life, from entrepreneur to county manager, from corporate executive to a homeless pizza delivery boy—in that order!

Are you so wrapped up in the day-to-day tasks of working hard that you’ve never stopped to figure out where you want to go? Maybe you have goals for yourself, your family, your career, your business and employees, but you face challenges in realizing your dreams. Maybe, like Bob, you had worked hard and achieved success, but then today’s economy knocked you down.

If you’d like to get started, or need to start over, on creating the life you truly want, you can do it! Armed with profound and profoundly simple concepts, Bob will point you in the right direction and provide you with a roadmap to your destination. Learn to See the End First and live the Three Simple Yet Difficult Rules of Success and you will succeed!

- Hard work will eventually pay off.
- Consistent competency is better than erratic excellence.
- Never go into the ring without the will to win.

CLOSING KEYNOTE: “MAKING A DIFFERENCE” – STEVE GILLILAND

Focusing on the conscious choices we make every day that impact the lives of others, Making a Difference™ is an eye-opening and heartfelt keynote detailing how to positively influence people in every imaginable way, regardless of position or status. Each of us has the potential to transform the culture of an organization through our actions and attitude. This presentation centers on three empowering dynamics:

- Purpose: It drives you!
- Passion: It fuels you!
- Pride: It defines you!

Takeaway Message – While we do not always know what challenges face the people we meet every day, we do have the power to bring them hope. That hope can multiply a thousand times over and spread throughout the world exponentially. This is the essential, motivating truth behind Making a Difference™!
**Member Spotlight**

**Sally Mendoza**

**My Name is:** Sally J. Mendoza  
**I work for:** Bryce Downey & Lenkov LLC  
**The firm and practice is:** Litigation, Insurance Defense, and Workers' Compensation.  
**My title is:** Office Administrator.  
**Before becoming an administrator:** I was a Legal Secretary.  
**I joined ALA Greater Chicago because:** My predecessor at the first firm I worked for as an administrator was a Past President of the Law Office Managers Association of Chicago (LOMAC), the local group that merged with ALA. Fortunately, I recognized a valuable resource when I saw it.  
**I have been working in the legal field for:** Many years. I received my CLM designation in 2007.  
**To be successful in legal administration:**  
1) Don’t take shortcuts  
2) Pay attention to the details  
3) Communication is everything  
**The thing I like best about being an Office Administrator is:** The opportunity to make a positive impact on the firm and on the people I work with, and no 2 days are the same.  
**One of the challenges of being in legal administration is:** It can be a real juggling act when you are dealing with all of the tasks involved in managing a law firm.  
**The best advice I’ve ever received is:** Your administrative skills may be topnotch, but if there’s a small stain on the carpet in the managing partner’s office, you can bet that will be mentioned in your next review.  
**I try to motivate my staff by:** Treating them like adults.  
**If I weren’t an administrator, I would:** Be an architect.  
**The last good book I read was:** The Great Gatsby, by F. Scott Fitzgerald (I just re-read it after many years, and was reminded why I enjoyed it so much the first time).  
**The last good movie I saw was:** Steven Spielberg’s *Lincoln*.  
**The last vacation I took was:** Pentwater, Michigan to attend the wedding of a good friend.  
**The one appointment that I never miss is:** The chance to have drinks with my friends.  
**In my free time, I enjoy:** Spending time with my grandchildren and spending time at our lake house in Michigan (every season has something wonderful to offer).
Moving your law firm’s website: free & easy

What’s holding your website back? Outdated copy? A few of the latest features? The idea of moving your firm’s website may be scary, but when a full redesign is out of the question, Firmwise can help you get current and stay ahead with the industry’s simplest management tools. Call us at 312.244.3733 to learn more.

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Firm Security

HEY! You Have a Hole in Your Firm’s Security!

By: J.D. Talken

Right now there is a guy in a basement somewhere conspiring against you to find out your employees’ personal information to steal their identity, target you for industrial espionage, or just to satisfy plain old boredom. This fear, uncertainty and doubt may not move you to do something about this hole in your security, but you have a choice to do something about it now or pay the consequences later.

With simple, straightforward security policy measures and mobile device management, you can protect your firm and minimize these risks. For the same reason that you get insurance, you should invest in these measures to keep your firm from damaging liabilities.

Recognizing that these threats are real and are out there is the first step in the process to doing something about it. Taken from a Verizon mobility consulting white paper, below you will find various descriptions of the many and varied ways that you are targeted by the "bad guys.”

“UNDERSTANDING MOBILE SECURITY THREATS TO ENTERPRISE DATA”

The landscape of solutions or tools available to address security threats is continuously evolving. Understanding the full landscape of threats against mobile data and available solution options is critical in coming up with a strategic approach towards managing and securing enterprise mobile data. In order to understand the threats against enterprise mobile data better, it is useful to categorize data based on its state within the mobile ecosystem. See the table on the following page for the definitions of these categories.

Enterprise mobile data is subject to a wide range of security threats based on the state of the data which may also vary in severity based on the architecture and security capabilities of the underlying mobile OS platform.

Downloads from Unknown Sources. On Android and Windows phones, it is fairly straightforward for the user to download and install applications from unknown sources. These potentially malicious applications may be downloaded from the Internet or copied from Secure Digital (SD) cards and can expose enterprise data at rest to be copied, transmitted or altered for malicious purposes. In addition, malicious applications can launch attacks against on-device data as well as remote enterprise applications.

Downloads from Public App Stores. These stores are notorious for malware applications due to their liberal policy of accepting all submissions. The user can innocently download an application that may maliciously target enterprise data at rest on the device or in the cloud.

Native Productivity Applications. With the exception of BlackBerry OS, mobile OS platforms do not save enterprise data in encrypted format by default. Furthermore, anyone who has access to the device can open the native productivity app without any strong authentication.

Jailbreaking. Jailbreaking Apple iOS or an Android device is fairly trivial. A user of a jailbroken device may accidently download malicious software that can intercept sensitive data in transit or launch attacks against data at rest within the enterprise cloud infrastructure. Jailbreaking is a liability that cannot be accepted in the enterprise.

Unencrypted Communication. If an enterprise application communicates with back-end systems without strong mutual authentication and encryption of the communication channel, there is a strong likelihood of exposure to “man in the middle” attacks which may not only compromise sensitive data in transit but also fuel additional attacks in the future.
Lost / Stolen Device. If an employee loses a mobile device with enterprise data, it is easy to jailbreak (iOS, Android) and retrieve any data that is not encrypted. In addition, if the device does not have password protection, it is easy to conduct a “man in the middle” attack by impersonating the victim.

Personal Mobile Devices. Can be a risk to enterprise data security unless the device is under active management of the Enterprise and has the same security policies as corporately liable devices.

Shortcomings in Mobile OS Security. In order to protect enterprise data on a mobile device, it is essential to have a sandboxed environment for enterprise data that is encrypted so that it does not get compromised even in the face of theft and jailbreaking. In addition, security policies need to be in place that at a minimum require the user to enter a strong password to access the device as well as any enterprise apps installed on the device.

Core OS Bugs. Security bugs in the core OS may compromise the entire device. For example, mobile devices could be jailbreaked by simply visiting a website. Typically, the OS vendors rush to fix these issues as soon as they are discovered, but there is a period of vulnerability until the devices have been patched.

Mobile HotSpot (tethering). Is a useful productivity feature but if the tethering is done over a non-secure channel or with weak security, e.g. WEP, it is possible for someone in the vicinity to capture the entire communication.

P2P/Adhoc Sharing. A number of notable mobile malware infections have taken place over P2P channels such as Bluetooth. The malware can subsequently spy on sensitive information, reduce user productivity by causing battery drain, or cause financial loss by using messaging/data features on the device.

Forming a mobile data strategy and using a straightforward security policy enforcement can resolve many of these holes in your security and mobile device strategy. It is recommended that you work with your mobile providers and technology support team to help guide you through the process of choosing a mobile device management platform that is secure and best fits your firm’s need. With their guidance, you will be in a better position to ensure your security policies are enforced to give you the peace of mind when attaching corporate data to mobile devices.

J.D. Talken has been in the wireless industry for over ten years. He was hired into the wireless industry for his background in manufacturing and transportation industries. In this role he was looked to as a subject matter expert in the area of creating connections between useful business analytics and reporting to help make critical business decisions. This has lead to his leadership roles wherein he has managed teams of subject matter experts who bring their experience every day to businesses to help them become more efficient or generate more revenue through the application of technologies to do so.

J.D. can be reached at jdtalken@verizonwireless.com; 224.217.0931
Got CLM?

Test your knowledge.

By: Jose Cheesman, CLM

When studying for the test, it is amazing how much valuable information is obtained through each of the study sessions. The following is a sample of new and interesting knowledge learned through one of the CLM study sessions.

1) **True or False** - From a legal point of view, the main problem with a sexual relationship between a supervisor and a subordinate, regardless of the gender of either party, is that such a relationship is not clearly consensual

2) **True or False** - Financial planning and counseling services are especially valuable and most widely used for younger employees who are not used to handling finances

3) **True or False** - Talent management has a broader range of activities than does training and development

[Answers on page 37]

**Did You know?**
The American Psychiatric Association ("APA") recently published the fifth version of its *Diagnostic and Statistical Manual of Mental Disorders* ("DSM-5"), which is a widely-used handbook for health care professionals to assess and diagnose mental disorders. According to the APA, DSM-5 – which is the first major revision since 1994 – accounts for the wealth of new research and knowledge about mental disorders since the release of the last version. DSM-5 includes new diagnoses for mental illnesses such as communication disorder (persistent difficulties in the social uses of verbal and nonverbal communication), new depressive disorders (including recognition of a premenstrual dysphoric disorder), and certain impulse related disorders (such as hoarding and skin-picking).

- DSM-5 includes mental disorders of which managers, supervisors and human resources personnel may not be knowledgeable, but that may be implicated by the Americans with Disabilities Act and amendments thereto. Accordingly, employers are advised to take steps to ensure that their management and human resources personnel carefully respond to employee requests related to mental disorders, including engaging in the interactive process and providing reasonable accommodations where appropriate.

http://www.mondaq.com/unitedstates/x/253176Employee+Benefits+Compensation/DSM5+May+Result+In+More+ADA+Trouble+For+Employers

**Study Schedule**

**Please note that the study group locations may be changed to another location based on the convenience of those participating.**

I. **HUMAN RESOURCE MANAGEMENT - 35%**

   Employee Selection and Promotion (12%)

   **Monday, September 02, 2013**
   Knowledge of procedures and tools for recruiting, selecting and promoting employees; Knowledge of U.S. Federal employment laws (e.g. Civil Rights Act of 1964, ADA, ADEA etc.).

   Performance Management & Compensation (18%)

   **Monday, September 09, 2013**
   Knowledge of U.S. federal employee benefit laws (e.g. FLSA, COBRA, FMLA, HIPAA, ERISA); Knowledge of performance management systems (e.g. appraisal, disciplinary, and termination procedures).

   Organizational Development (5%)

   **Monday, September 16, 2013**
   Knowledge and expertise in personnel training and development systems/methods; Knowledge of employee motivational techniques; Knowledge of incentives/rewards systems (e.g. compensation, employee benefits).

   **Monday, September 23, 2013**
   Knowledge of leadership styles and techniques; Knowledge of team development and management principles (e.g. self-directed teams, team building); Knowledge of organizational development techniques; Knowledge and skill in negotiation and conflict management techniques.
II. LEGAL INDUSTRY/BUSINESS MANAGEMENT - 17%
Legal Industry (12%)

Monday, September 30, 2013
Knowledge of the ABA Model Rules of Professional Ethics as it pertains to law firm management (e.g. conflict of interest, advertising, client file management).

Monday, October 07, 2013
Knowledge of professional liability issues.

Monday, October 07, 2013
Knowledge of changes/trends in the legal industry.

Monday, October 14, 2013
Knowledge of records management and retention requirements (including paper and electronic documents). [Knowledge of filing systems].

Business Management (5%)

Monday, October 21, 2013
Knowledge of laws and regulations regarding business insurance coverage.

Monday, October 21, 2013
Knowledge of planning techniques (e.g. strategic, disaster and business planning).

Monday, October 28, 2013
Knowledge of procurement and contract management procedures (e.g. developing requests for proposals, evaluating proposals, overseeing contractor performance).

Join Jose Cheesman, MSLA, CLM, CLM Director, at his office every Monday at 5:30 (Baker & McKenzie Global Services LLP), 300 East Randolph Street, Suite 5000) for the weekly study group.

Answers: 1) True 2) False 3) True

Got CLM?

What they’re saying about CLM

What started out as a dare in the ALA Bookstore at the Boston Conference turned into a fulfilling personal experience. It had been a few (hah!) years since college, so getting back to the discipline of studying was a bit challenging. I was fortunate to team up with a wonderful study group that made preparation for the exam more bearable and the Chapter had excellent study materials to share. I brought my CLM flashcards on a cruise with me and reviewed them nightly on the pool deck. One entertainment coordinator thought they were Trivial Pursuit cards and recruited others to join me in a game. They were a little confused when the first card they pulled was about an Absolute Net Lease. While preparing for the exam, I increased my knowledge base and also realized how much I had learned in my 30 years in the industry. I just now know the right terms for what I was doing. I encourage anyone considering sitting for the exam to go for it. You probably know more than you think you do. And you will get a really cool “GOT CLM” pin!

Jane C. Brinkworth, CLM

Acquiring my CLM designation was a personal goal for me. I have been a legal administrator and a member of ALA since 1992. As an Administrator, I have had varying responsibilities at the several firms I have worked at since that time. I felt it important to learn as much about the various areas of responsibility as possible and keep apprised of the current trends, rules, regulations and best practices in the various areas, to ensure that I am always doing the best job that I can do. Participating in the study group prior to taking the exam, and then taking courses to obtain the required CLE credits to maintain the certification, has helped to ensure that I do so.

Jena M. Neisler, CLM
Last year you read about Best Practices in Managed Print Solutions.

Budget pressures driving that article remain and are, if anything, more intense, pushing every member of your organization to look for ways to reduce costs and increase efficiency, while still delivering consistent professional services to clients.

Printing and copying are key to law firm support operations, and drive higher costs than most managers think.

Studies by InfoTrends/Cap Ventures suggest that actual costs are often double the estimates of operations executives. On average, upwards of 3% of enterprise total revenue is spent on hard copy imaging and output, with much of it wasted due to poorly planned and fragmented print management. You should note that this study was conducted across a range of business entities, and that because of the nature of a law firm and the degree to which its business is driven by documents, 3% is a modest number for ALA members who should assume at least 5%.

This article will focus on the basics of getting started with the MPS process of managing printer/copier assets, consumables and services to completely support your firm’s needs at the lowest possible cost.

CERTIFICATION

When selecting an MPS partner, look for industry certification of both the vendor and technicians from …

The highest designation is CompTIA PDI+

From CompTIA “… Designation as a CompTIA PDI+ Authorized Service Center is validation that a service center has achieved the technology industry’s highest recognized level of competence. It is a strong sign that the organization and the individual certified technicians are committed to advancing the quality of their operations and service...participating in ongoing programs to maintain expertise at the cutting edge of office digital technology, hardware, software, networking and connectivity, servers, and document imaging technology, print engine and scan processes and components, electromechanical components, tools, and more. CompTIA PDI+ certification is recognized around the world and throughout the IT Industry as the highest level of knowledge and skill standards for technology professionals.”

For more information, you can visit www.comptia.org.

Beyond CompTIA, ask about factory certifications, and local coverage of warranty work. The best local resources are subcontracted by the primary manufacturers to support new deliveries in the market.

ANALYSIS AND REDEPLOYMENT OF CURRENT ASSETS

The cost of a document is developed once the true printing and copying behavior and asset deployment of a firm is completely understood and analyzed, and that is the starting point in applying a true MPS approach. The first step in the analysis is a review of the inventory of assets, and how each is used and by whom. Are highest speed machines matched up with the highest output users? Are color machines only deployed where color is really used? How are the assets networked?
When an asset is not optimized relative to how it is used, expensive bottlenecks can occur, and when a color machine is networked to a user who does not really need color, a more expensive machine and its consumables are underutilized. When assets are acquired one at a time, without an overall plan, it is really amazing what is found in terms of poor asset deployment and waste.

Often, double digit savings can be realized with zero short term investment in new equipment.

**WEBSITE PORTAL**

To assist your ability to manage your fleet, work with an MPS partner with a website portal that can allow you to see and analyze your entire printer/copier fleet, with each asset’s identification number, IP address, toner level, error messages, page count analysis, maintenance kit status, service status and history, order supplies, request service call and more.

Basically, strong web portal support provides all of the information you need to efficiently and centrally manage the fleet whether you have 10 machines or 1,000.

And if you have questions, or need professional analysis by technicians, all of that information is also readily accessible by your vendor’s technicians at their headquarters location.

**AUTOMATIC TONER REPLENISHMENT - ATP**

Through your network, every machine is monitored for toner usage and capacity. When toner in any machine reaches a predetermined reorder level, typically 90%, a signal is automatically sent to your designated IP manager, and to your MPS vendor support lab. An order is automatically placed and delivered the next day, complete with a label identifying the particular printer or copier about to run out of toner. This should be a no charge service.

The efficiency and cost reduction advantages are clear

1. Never run out of toner, avoiding expensive machine downtime.
2. No time taken to identify the low toner, find the correct part number or place and receive the order.

3. Always order the correct toner for the specific printer/copier or MFP.
4. When the toner is received, it is labeled to identify the specific printer for which it is intended.
5. Eliminate backup inventory requirements which tie up cash and use limited storage space.

ATP is a major cost and time saver in managing your fleet.

**COST PER PAGE**

A primary objective of the initial review of a firm’s printing and copying fleet is the calculation of total consolidated costs of operating and servicing the specific mix of machines owned and how they are used when optimally redeployed. The result of this review is a proposal on the basis of cost per page.

This simplifies the process of funding the operation of your fleet, boiling down to one monthly charge for every page printed or copied across the range of printers, copiers, scanners and multi-function machines. One cost per page bill covers toner, maintenance kits, service calls, labor and parts.

Cost per page is a solution in which you pay only for the printing and copying that is actually done.

**CONCLUSION**

MPS has been widely recognized as the most cost effective and efficient solution to manage the many documents and the infrastructure required for a firm to operate. The management of the process is simplified and the costs reduced. It is a planned approach that every law firm should seriously consider, and more and more are doing so every day.

Cheryl Ferguson is a CompTIA PDI+ Certified MPS Professional and can be reached at 847.631.7414 or via email at cherylferguson@warehousedirect.com or contact your Warehouse Direct Representative for any questions.
New Members & Anniversaries

The Greater Chicago Chapter wishes to welcome our new members:

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