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Greater Chicago Chapter Mission Statement
The mission of the Greater Chicago Chapter of the Association of Legal Administrators is to serve the diverse and evolving needs of our members and the legal organizations they represent by:

- providing high-quality educational programs;
- promoting peer networking opportunities;
- fostering professional alliances with business partners; and
- encouraging our members’ active involvement and service in community efforts.

The Administrator’s Advantage is published on a bi-monthly basis by The Greater Chicago Chapter of the Association of Legal Administrators. The newsletter is published as a service to The Greater Chicago Chapter members and others interested in law firm management. Any article or advertisement published here should not be considered to be an endorsement by The Administrator’s Advantage of the opinions expressed in the articles or of the products or services advertised. Contributing writers are asked to disclose affiliations or interests that may influence their writing positions. Anyone interested in contributing an article or otherwise participating in the production of the newsletter is most welcome and should contact the editor.

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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. 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

It's hard to believe we are more than halfway through summer. With the cooler than normal temperatures, it almost does not feel like we are having a true summer. One “season” that doesn’t change is technology. It is quite a feat to be able to keep up with all of the trends and issues that technology embodies. One way I do this is to attend as many conferences as I can to get a first look at all the new software and products there are. Thankfully we have many business partners in this area and they are always very helpful and knowledgeable about their products and services.

In this issue we are offering some articles on topics like managed services, bring your own device (BYOD) pros and cons, using technology for print management and some of the most helpful iPad/tablet apps for lawyers.

On the lighter side, we also have our Legal Levity section which includes all of the components for a perfect picnic and our top 10 reasons why you need a new iPad.

We hope you enjoy this issue. We are always looking for new ideas and content for our newsletter. Please contact a member of the newsletter committee if you would like to comment or contribute.

Enjoy the rest of your summer! 

Mary Lynn Wilson, CLM
Newsletter Editor

Cray Huber Horstman Heil & Van Ausdal LLC
mlw@crayhuber.com
# The Greater Chicago Chapter

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Thank You & the entire Greater Chicago ALA Chapter!

We are thrilled to be part of your future.

Excited to be back!

See you soon!

Mitchell Weiner
Founder, Chief Happiness Officer & Owner

212.204.1193 | mweiner@fso-outsourcing.com
One North Wacker, Chicago, IL 60606
President’s Message

TECHNOLOGY: OUR LOVE/HATE RELATIONSHIP

Technology surrounds us more and more each day. Some days we love it and cannot wait for the next great development that will ease our lives, while other days we hate it and just want to revert to simpler times. Just a sample of how quickly our technology changes and integrates into all our daily lives:

- 11 years ago, the latest tech craze was an innovative, monochrome-screen device called a BlackBerry that would miraculously allow you to get your email through a portable pager-like device. For many, this is when our availability to be reached truly turned into 24/7/365.

- 7 years ago, we saw the first consumer-level smartphones hit the mass market. Not only were we now able to remotely get our emails and texts, but we could also surf the web and utilize apps anywhere and anytime we had a signal.

- 4 years ago we were introduced to mainstream consumer tablet devices. Now, most of us cannot imagine getting through the day without utilizing one.

All of these devices have been promoted as time-savers, but unless you manage them well, they can easily become complete time-consumers. New technology arrives each day. What will be next?

Unless you are in an extremely remote part of the globe, you have the opportunity to always be connected to family, friends and thousands of strangers via phone, text, email and social media. It may come as a surprise to many that I currently do not participate in much social media, but I am astonished at its global reach. Recently, my wife took a photo of our family heading to watch the World Cup final and posted it on her Facebook page. Within one minute, one very short minute, we received comments and photos from friends and family in Chicago, Central Illinois, Denmark, Colombia and all corners of Germany. I was amazed at how many of our family and friends were monitoring social media at one given point in time. This was remarkable, yet frightening at the same time. For many, this branch of technology has become part of who they are and how they network and socialize. Even a new phobia has arisen in the past few years, Nomophobia is the fear of being out of cellular contact and the fear of not being connected to the internet.

All this ever-changing technology can make one feel older, especially when you have young children pointing things out to you. A few recent examples have been...

Listening to FM car radio, my children were frustrated and confused when they did not like the song and we could not just skip it, but rather, we had to listen to the entire song (and commercials) that we did not choose to play.

My daughter was bewildered while watching an episode of the ‘Brady Bunch’ and wanted to know why their phone was tied to the wall with a cord and why they had to twirl a plastic dial to make a call.

Recently we took a ten minute detour to explore a phone booth we stumbled upon, explaining what it was, how the phone booth was used, and that there was a time when nobody walked around with a cell phone.

While watching an old black and white movie, my son walked into the room and wanted to know when I was going to turn the color on.

Love it or hate it, we are living in an era with the fastest changing technology in history. The half-life of technology had previously been measured in decades, then years, and has now been reduced to months, especially for tech-craving individuals who desire the “latest and greatest” tech tools. Without all of this amazing technology, I could not be sitting in an airport waiting for my flight, connected to my office via the web, writing this article, checking email, and texting my boss. Love it? Hate it? 😎
Help your chapter WIN!

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alanet.org/chapters/chapter-vs-chapter
New Members

The Greater Chicago Chapter welcomes our new member and congratulates our members on the move:

Mark T. Verbecken  
Executive Director  
Chapman and Cutler LLP (240 Attorneys)  
111 W. Monroe Street  
Chicago, IL 60603  
Tel: 312-845-3440  
verbecken@chapman.com

Karen Gifford  
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mfiorito@ssh-cpa.com

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Office Manager  
Morgan, Lewis & Bockius LLP (65 Attys in Chicago; 1,400 Internationally)  
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Congratulations to these newly retired members:

Susan Leis  
Legal Administrator  
O’Keefe, Lyons & Hynes LLC  
Retired as of April 10th.

Fred Weber  
Director of Administration  
Chapman & Cutler LLP  
Retired as of July 30th.

Best wishes on your retirement and/or new ventures!

New Members

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Director of Administration  
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how are we going
to be ready in time?
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Gold Business Partner/Member Soiree at The Wit

On July 15, 2014, the Chapter sponsored its annual Members Only Gold Sponsor Soiree at the ROOF on the Wit Hotel. The event gave members the opportunity to express their appreciation to DTI, FSO, and UPS for their Gold-Level Sponsorship and support of the Greater Chicago Chapter.
Got CLM?

Test your knowledge.

By: Jose Cheesman, CLM

1. Cloud computing is:
   A) Dreaming at work while on a computer
   B) A delivery of computing as a service that allows software, information and resources to be shared
   C) A computing product that allows access to a single user to the network at a time
   D) Placing your servers on the top floor

2. What type of billing arrangement is most benefited by the use of technology:
   A) Hourly
   B) Blended rates
   C) Flat fee billing
   D) Contingency

3. When it comes to technology, “Hacking” is also known as:
   A) An effort to manipulate the normal behavior of network connections and connected systems
   B) “Chopping” bites into bits, and then “pasting” back in wrong order
   C) Logging on to business’ websites to obtain details about their products and services
   D) When associate is pretending to be a partner at a law firm and steals his password

4. True or False: Because technology and upkeep of same is so expensive, firms usually never see a return on their investments.

Future Study Dates FOR 11/10/14 EXAM
(Application Deadline 9/8/14)

Business Management (5%)

Monday, September 1, 2014
Knowledge of laws and regulations regarding business insurance coverage;

Monday, September 1, 2014
Knowledge of planning techniques (e.g. strategic, disaster and business planning);

IV. OPERATIONS MANAGEMENT - 18%

Technology (5%)

Monday, September 15, 2014
Knowledge of the features and capabilities of the Internet, web-based technology, hardware and software systems, including security and confidentiality;

Monday, September 15, 2014
Knowledge of the features and capabilities of practice support systems; (e.g. Lexis-Nexis, Westlaw, research, document management, litigation support, case management);

Monday, September 22, 2014
Knowledge of the features and capabilities of document assembly and management systems;

Monday, September 22, 2014
Knowledge of electronic privacy issues;

Operations (13%)

Monday, September 29, 2014
Knowledge of work product quality control procedures and techniques;

Monday, September 29, 2014
Knowledge of facilities management procedures and techniques;

Monday, October 6, 2014
Knowledge of lease/contract agreements and terminology;

Monday, October 13, 2014
Knowledge of project management;

Monday, October 20, 2014
Knowledge of work place safety and health issues (e.g. OSHA, EAPs);

Monday, October 27, 2014
Knowledge of space assessment, design and development strategies.

REVIEW FOR 11/10/14 TEST

Monday, November 3, 2014
Q&A & Final Review

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

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**Sep. 10** – 12:00 PM – 1:00 PM  
Small Firm Meeting  
Adelman & Gentelman Ltd.  
53 W. Jackson, Suite 1050

**Sep. 11-13** – ALA BUSINESS OF LAW CONFERENCE  
Palmer House  
17 E Monroe Street

**Sep. 16** – 11:45 AM – 1:00 PM  
Bi-Monthly Meeting: Avoiding Pitfalls with Employee Handbooks  
The Standard Club  
320 South Plymouth Court

**Sep. 18** – 12:00 PM – 1:00 PM  
Mid-Size Firm Meeting  
Location: TBD

**Sep. 24** – 12:00 PM – 1:00 PM  
Large Firm Principal Office/Administrators Roundtable  
Quarles & Brady  
300 N. LaSalle, Suite 4000

**Oct. 16** – 12:00 PM – 1:00 PM  
Joint Small/Mid-Size Firm Meeting  
Howard & Howard  
200 S. Michigan, Suite 1100

**Oct. 22** – 12:00 PM – 1:00 PM  
Large Firm Secretarial Managers/Supervisors Roundtable  
Marshall Gerstein & Borun  
233 S. Wacker, Suite 6300

For a listing of all upcoming events, visit: www.alachicago.org

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I WORK FOR:
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- Renovated tri-level fitness center, featuring strength training, cardio equipment and a Junior Olympic size swimming pool.
- Michael Jordan’s Steak House; adding a modern twist on the classic steak house worthy of its exclusive Chicago address and iconic namesake.

MY TITLE IS: Business Travel Sales Manager

BEFORE BECOMING A BUSINESS PARTNER TO THE LEGAL MARKET, I WAS: A Membership Director at the Mid-America Club located at the top of the Aon Building. I was responsible for member retention, member satisfaction, member events and overall communication to members.

I ENTERED THE LEGAL MARKET BECAUSE: As I entered into the Chicago hotel industry, I soon discovered the travel demand the legal market had to offer. Over the years, I have worked hard to network and provide hospitality accommodations to legal travelers. The legal market is full of seasoned travelers who remain loyal to their preferred brands.

I HAVE A DEGREE IN: B.S. in Public Relations from Ferris State University located in Big Rapids, Michigan. I was a Resident Advisor for two years, a four year member of the Ferris State Dance Team and was a board member of the Public Relations Student Society of America.

I SUPPORT ALA BECAUSE: ALA is about building relationships and doing good business. I am happy to support ALA because of the numerous resources and marketing efforts available for members.

TO BE SUCCESSFUL IN THE LEGAL MARKET, ONE HAS TO: Be Motivated!

THE THING I LIKE BEST ABOUT BEING A BUSINESS PARTNER TO THE LEGAL MARKET IS: The opportunity to build cultivating relationships.

THE BEST ADVICE I HAVE RECEIVED IS: “Under Promise, Over Deliver!”

THE BEST ADVICE I WOULD GIVE TO SOMEONE JUST ENTERING THE LEGAL MARKET IS: Do not be afraid to ask your superiors and colleagues questions.

I TRY TO MOTIVATE MYSELF AND/OR MY STAFF BY: I am motivated by competition! I try to motivate others by thinking positively, leading by example and acknowledging small victories.

THREE THINGS I DO WELL ARE: I am a team player, provide excellent customer service and listen closely.

WHILE I LOVE MY CURRENT JOB, MY DREAM JOB WOULD BE: To own a vineyard

THE LAST GOOD BOOK I READ WAS: The Glass Castle

THE LAST GOOD MOVIE I SAW WAS: I rarely watch movies due to my Netflix obsession: House of Cards!

THE LAST VACATION I TOOK WAS: Punta Cana (February 2014) for my husband’s incentive trip.

IN MY FREE TIME, I: Workout daily, try new restaurants in Chicago and spend time with my Black Labrador Retriever, George!
The Role of Progressive Discipline in Positive Employee Relations

By: Yvette Heintzelman, Clark Baird Smith LLP

While it may be called many different things, most employers, large and small, use some form of progressive discipline. Regardless of the name, progressive disciplinary policies have three points in common: 1) they require the employees to know what rules are applicable to their conduct; 2) they require the employer’s disciplinary response to be proportionate to the employee’s conduct; and 3) they provide sufficient support and justification for the employer’s response, should the disciplinary action be challenged in some third-party forum.

Done right, progressive discipline can:

1. Allow supervisors to intervene and correct employees’ behavior at the lowest level possible (first sign of trouble) when it is easier to have a conversation without significant consequences;

2. Increase employees’ morale and retention by demonstrating that there are rewards for good performance and consequences for poor performance;

3. Reinforce fairness and consistency in responding to performance and behavioral issues; and

4. Set forth the foundation for a legally defensible termination decision for employees who cannot or will not improve.

Most employees want to exceed overall, not simply meet the company’s expectations. Therefore, the first step in creating a successful progressive discipline system is to let the employees know what to expect. Those expectations should be spelled out in black and white, simple terms in employee handbooks, job descriptions and performance reviews. Employers may also solicit input in the creation of the expectations and ensure that the rules are written in easily understandable language that is distributed to all employees and reviewed in staff meetings or other employee gatherings.

The most important aspect of a successful progressive discipline policy is that once the rules are set forth, discipline should be implemented in a fair and consistent manner. Before implementing discipline, a manager or supervisor should ask himself/herself the following questions:

1. Did the employee have adequate warning that the behavior would result in disciplinary action?

2. Was the rule reasonable, safe, and related to the company’s needs?

3. Did the employer make an effort to conduct a fair investigation and determine whether the employee violated the rule?

4. Have the rules and penalties been consistently enforced in a fair and equitable manner?

5. Did the disciplinary action take into account the seriousness of the offense, the employee’s record, and the employee’s level of responsibility within the organization?

Progressive discipline also helps avoid the consequences of allowing workplace problems to continue unchecked. If performance issues are not addressed, an employee may not know that his or her behavior or actions are unacceptable. Not only will you have lost an opportunity to help the employee improve, but your company will continue to suffer the consequences of the employee’s problems, which could result in reduced productivity and profits, quality control problems, lost opportunities, loss of customers, low employee morale and higher turnover.
Jose Cheesman and Dan Campione

“As a Certified Legal Manager I feel a sense of satisfaction in knowing I am part of a growing group of legal managers raising the bar for our profession, and I am glad I went through the process. Studying for the exam helped me strengthen my knowledge and skills in areas of administration I don’t often use day-to-day, but I do need to draw upon as the demands of my firm dictate. CLM has made me a better-rounded administrator and leader, ready for anything.”

The effectiveness of a progressive discipline policy depends upon the supervisor’s exercise of good judgment, fairness, tact and common sense in its administration. By establishing clear and reasonable work rules, communicating those work rules to employees and applying them in a consistent manner, supervisors set standards that will ultimately maximize employee performance, productivity, and morale, which is the goal of every successful organization.

New Member Mark Verbecken, Executive Director of Chapman and Cutler, attended his first Bi-Monthly Luncheon. Welcome to the Chapter, Mark!

The ALA Certified Legal Manager (CLM)SM program has been helping legal managers chart their courses to personal satisfaction and professional success for more than 10 years. Find out how CLM is right for you at www.alanet.org/clm.

www.alanet.org/clm

Confidence. Leadership. Mastery.
Steve Wingert, CLM
2012-2013 ALA President

New Member Mark Verbecken, Executive Director of Chapman and Cutler, attended his first Bi-Monthly Luncheon. Welcome to the Chapter, Mark!
Webinar Recap - Health Promotion

Health Promotion in a Technology World
By: Judy Hissong

“Boundaries, people! Boundaries!” I find this message popping up in my mind more and more as I travel on airplanes and public transportation where people are so glued to their tiny keyboards that I am moving to avoid crashing into them.

In that moment it’s more of a head shaking tsk and an overall disappointment that we have come to a place where we would rather look at a small screen than another human being. And that’s the tip of this iceberg.

How many of us are using every available moment to check into our email, Facebook, Instagram, or Pinterest accounts? Or maybe playing Candy Crush or another recent game invented for the tiny screen? We aren’t disengaging with our technology, and there is a price to be paid over time. Do we really want to pay it?

We are built to survive, our bodies and minds are incredibly resilient and our ability to process information surpasses any previous generation…..is that a good thing? Not necessarily. Look around you; do you see a rise in brain-based ailments? Mental health challenges? We simply must decide to disengage and restore our minds to maintain high function as we age. The evolutions of mindfulness as a teaching modality, of meditation as a daily ritual, and of yoga as a workout are all indicators of how strongly we want to disengage.

I believe it’s even more basic. I believe this all begins with boundaries. So, we start at home, with you as an individual. This is the opportunity for you to consider what your boundaries are for your career, your home, and your life. What are your physical, mental, emotional, and energetic boundaries right now?

Your physical boundaries: When people enter your office space do they see your back first? When you engage in conversation with others is there enough room between you and the others involved that you are comfortable even when the topic is difficult?

Your mental boundaries: Do you leave work at work? Do you have a limit on the number of hours in a day that you dedicate to your job?

Your emotional boundaries: Are you comfortable taking care of your own needs? Do you move your body to release stress and improve health? Do you have hobbies or interests which engage you with friends on a regular basis? What are you willing to do or not do to take care of yourself?

Your energetic boundaries: Are there people in your life who are draining? If so, what do you do to separate yourself from their negative energy? How frequently do you interact with them?

These are questions to help you decide what your current boundaries are, and also to help you shape new ones. Understanding your current commitments and how you feel about your life will give you ideas for new boundaries and new energy.

We know that the human mind will disengage every 90 minutes to recharge itself. Stepping away from your computer screen, the long meeting you are in, or the report you are reading gives you a renewed focus on the task, and takes only a few minutes of time.

My suggestions are simple:

- Every 90 minutes of your workday, take 1-3 minutes to step away completely from your work. Try a couple deep breaths with your eyes closed, and check in with your body. Stretch your arms and legs, only thinking about how your body feels during those moments. Creating this physical boundary between you and your work will disengage you, re-energize you, and give you a fresh start when you return.

- Establish a technology-free zone – time or space. Consider no technology in your bedroom or your bed. Perhaps you turn off all the access to the “cloud” at 10 pm each night (or earlier!). Create a boundary which is sustainable for you and accentuates the importance of your restoration for the new day tomorrow. You may struggle at first. You may need a few weeks to settle into a different relationship with the technology. Leaving work at work at the end of the day, in a pre-determined way, will provide you the freedom to recharge your mind.

- Take a minute to check in with your body. We each have our own individual reactions to stress – tight neck, raised shoulders, upset stomach, short temper, shortness of breath, red face, etc. What are yours? Identify three to five signs of stress that everyone around you sees when you are stressed. Become aware of how others react when your
body shows your stress, listen and watch for their cues that are in response to a change in you. This will guide you in understanding more about how you behave when you are stressed. Determine what is in your mind at those moments, and then replace those thoughts with more realistic and less stressful thoughts. The emotional energy we expend in stressful situations is recovered and we are less inhibited in moving toward activities and interests which take care of ourselves.

When relating to someone that you know will cause your insides to heat up, consider what relationship you want to have with that person. Think about the importance of the communication, the message you want to deliver, and employ your listening skills for the content they are delivering. Focus on the present, and let go of past miscommunications. This energetic boundary may be the most nuanced of them all, which also means it’s the easiest to employ and enjoy.

One step at a time. Boundaries create opportunities to raise your performance levels at home and at work, so give yourself permission to set them in ways that develop self-awareness and self-care. Utilize your support system to hold you accountable to the limits you name, and consider both your past and your present so these new boundaries are sustainable.

Now, step back into the task at hand, re-focused, re-energized, and ready for the challenge.

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Courtesy of Judy Hissong, Certified Legal Manager and a Professional Certified Coach. Judy is the Principal of Nesso Strategies, a company built on the passion of exploring how success is achieved outside the box! Judy facilitates strategic meetings, consults on bottom line improvement, and trains on teambuilding and leadership skills. She is an Accredited Executive Coach working with Managing Partners and Administrators to maximize their potential. She can be reached at judy@nessostrategies.com and 619.546.7885.
The iPad can provide a powerful tool for lawyers to simplify their lives and become more efficient "on the road." It gives lawyers the freedom and flexibility to practice our craft anywhere and at any time. The iPad (or any of the other tablet devices) is different than technology we've used in the past because it allows each user to customize his/her experience using "Apps" which will be most useful to the individual. It’s critically important, then, that the user be familiar with the wide world of Apps available and how they can be helpful to a legal practice in order to maximize the efficiency of his/her iPad experience.

In this article, I will identify tasks which are essential to an attorney’s practice and which Apps might be useful in helping the lawyer accomplish those objectives remotely. My assessment will be anecdotal in that I’ll focus on Apps I’ve used successfully in my practice. There are likely more/different Apps in each category described below that will have slight differences in features which may work more efficiently for your office and/or practice. I encourage you to check out the App Store to determine which Apps will work most seamlessly with your practice.

Attorneys are always in need of a convenient way to "meet" with clients and/or opposing counsel on the road. Face-to-face communications are generally preferable to audio (telephone) and certainly written (email) communications. The following Apps allow attorneys to communicate with others as if they were meeting in person.

**A. Standard communication**

1. **Facetime** is a fantastic tool for face-to-face communications with other Apple devices. All you need is the email address associated with the user’s Apple device and you can easily establish visual and audio connectivity with the proposed subject. It is by far the easiest communication method to use on the iPad and it is one of the “standard” Apps that exists on all Apple products. However, users can only communicate with other Apple users and cannot conduct a multi-party meeting using this App. Therefore, despite its convenience and relative ease of use, Facetime only presents a partial solution for attorneys seeking to communicate with their clients remotely.

2. **Skype** solves part of the communication problem in that it allows Apple users to communicate with Android users as well as Apple users. Skype requires the user to register, however, and can be cumbersome and unreliable. The service allows users to communicate with peers by voice using a microphone, by video using a webcam, and by instant messaging over the Internet. Phone calls may be placed to recipients on the traditional telephone networks. Calls to other users within the Skype service are free of charge, while calls to landline telephones and mobile phones are charged via a debit-based user account system. Skype has also become popular for its additional features, including file transfer and videoconferencing.

**B. Meetings/Document Sharing**

1. **GoToMeeting** is a web-hosted service created and marketed by the Online Services division of Citrix Systems. It is an online meeting, desktop sharing, and videoconferencing software that enables the user to meet with other computer users, customers, clients or colleagues via the Internet in real time. GoToMeeting is designed to broadcast the desktop view of a host computer to a group of computers connected to the host through the Internet. Transmissions are protected with high-security encryption and optional passwords. By combining a web-hosted subscription service with software installed on the host computer, transmissions can be passed through highly restrictive firewalls.

2. **Cisco WebEx** is also a meeting App that allows increased functionality for meetings with multiple participants. With Cisco WebEx the user can:

   (a) Invite and remind participants - invite participants to an online meeting that has already started via email, voice conference, or instant messenger, and send reminders about your upcoming meeting.

   (b) Record your meeting - record your actions during your meeting so you can review the discussion at a later time, or send to colleagues who couldn’t attend.

   (c) Share content - get everyone on the same page. Open any
document or application and discuss it in real time with other participants.

(d) Pass the ball - let other participants share and present documents from their computers and assign privileges to individual participants.

(e) Transfer files - avoid sending emails back and forth by exchanging files – no matter how large – in your meeting quickly, easily, and securely.

C. Drafting/Research

1. iAnnotate allows attorneys to make revisions/notes on a pdf and e-mail those revisions to the office to be finalized.

2. QuickOffice allows attorneys to produce and/or edit documents using the Microsoft Office suite of software (i.e. Word, Excel and PowerPoint), which eliminates the majority of formatting issues that must be edited when converting documents generated on Apple-based software.

3. Dragon Dictation allows attorneys to dictate directly into their iPad and it will produce text for same. It takes about 30 seconds of dictation at a time and the completed document can be sent directly from the App itself. In my experience the App is about 85% accurate and saves a lot of time drafting and transcribing short letters and emails. I still prefer typing longer documents (i.e., briefs, etc.) myself. For more seasoned attorneys who are accustomed to dictation, however, this App can be very effective.

4. QuickVoice allows attorneys to make voice recordings and email the recording as an attachment to an email. This App differs from Dragon Dictation in that it will not convert the voice recording to script. It is more of a replacement for a traditional dictaphone.

5. Notes is standard with the iPad and is precisely what it sounds like. It allows attorneys to draft, save, search and send notes via the iPad. I often start documents using the Notes App and rely on it more than any other iPad App for work.

D. Presentations

Trial Pad is essential for trial lawyers who want to use the iPad in court. It allows lawyers to present exhibits on a TV screen and to manipulate the exhibits (i.e., draw on the exhibits, call out certain words, etc.), all in the presence of the jury/audience and without the need for technical support. (Note: the App requires a stable Wi-Fi connection, so it may not be appropriate for older courtrooms.)

E. Practice Management

Reminders is also standard with the IOS 7 operating system. This App allows attorneys to set reminders for tasks the attorney needs to complete. The feature that allows reminders to pop up at a given location (i.e., at court or at the office) is particularly useful/helpful.

CamCard allows lawyers to scan business cards and save them to his/her iPad. Once the card is scanned, it will automatically update the attorney’s contacts, thereby eliminating the need for the business card to be entered manually into the attorney’s address book and/or contacts.

Tinyscan allows lawyers to use the camera function on his/her iPad to "scan" text documents and save the scanned document as a pdf. It functions as a pocket scanner the lawyer can use on the go.

Flightboard allows an attorney to track the status of his/her flight (regardless of the airline) and will send notifications to the attorney’s iPad and/or iPhone in the event of a delay or other issue.

F. Cloud Storage Program

Dropbox/Evernote/Google Drive/Box/iCloud: the iPad and iPhone allow limited (64 gigabytes max) material that can be stored directly on the device. Each of the aforementioned Apps provides cloud storage and back-up for information saved on the iPad. All of these Apps will also allow the attorney to recover information in the event his/her Apple device malfunctions.

G. Remote Desktop Program

Citrix/Jump/Pocket Cloud/GoToMyPC: lawyers get the most use out of the iPad when they are able to access their desktop on the iPad as if they were sitting in the office. Each of the foregoing programs allows an attorney to "sign in" to his/her work/home desktop as if he/she were sitting at the office. These Apps are arguably the most powerful tools a lawyer can use because it allows him/her to literally bring his/her desktop wherever he/she is. It is the ultimate in complete office portability.

An iPad with the appropriate applications has the potential to be a useful and effective tool to assist lawyers in practicing their craft remotely. As the demands of our profession increasingly require us to be able to be in constant communication with clients and to dole out advice from remote locations, it will be critical that each lawyer has a device that enables him/her to do so quickly and efficiently. The aforementioned Apps are designed to do just that.

Steven V. Hunter, Partner at Quarles & Brady LLP, is a trial lawyer with first-chair experience representing companies in all phases of litigation and alternative dispute resolution, including discovery, “e-discovery,” motion practice, arbitration, mediation, jury trials, bench trials and appeals.
After the winter we just endured, who was not looking forward to summer? Even the wet lackluster summer we are currently enjoying? To put me in a summer state of mind, I look back to the family picnics we had when I was growing up.

What makes the perfect picnic? Why, the perfect make ahead picnic recipes, of course! Let’s see if we can conjure up the perfect summertime picnic with some tasty dishes and drinks.

Deviled Eggs are my choice for the appetizer. For the salad, it’s a tossup between Broccoli Salad and good old-fashioned potato salad. Many people think that a sandwich makes the perfect main dish, but I’m still a fan of cold fried chicken. Of course, lemonade is the drink that declares “I’m on a picnic”. If you’re over 21, just throw a shot of vodka in it to give it a little kick. Last in our basket is dessert. I like to finish my feast with yummy home baked chocolate chip cookies for dessert, or hmmm? maybe cherry pie or apple pie. I just can’t decide! I’ll leave that up to you for "Your Perfect Picnic”.

Here are some recipes from your newsletter committee to help you create your perfect picnic!

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### Southern Buttermilk Fried Chicken

**Ingredients**
- 2 cups all-purpose flour
- 1 ½ teaspoons celery salt
- 1 teaspoon dried thyme
- ½ teaspoon black pepper
- ½ teaspoon dried marjoram
- 1 ⅔ cups buttermilk
- 2 pounds chicken pieces

**Directions**
Place 2 cups all-purpose flour, 1 ½ teaspoons celery salt, 1 teaspoon dried thyme, ½ teaspoon black pepper, and ½ teaspoon dried marjoram in a shallow bowl. Pour 1 ⅔ cups buttermilk into medium bowl. Heat oil in heavy, deep skillet over medium heat until oil reaches 340°F on deep-fat thermometer. Dip chicken in buttermilk, one piece at a time; shake off excess. Dip again in buttermilk and coat once more with flour mixture. Fry chicken, skin side down, 10 to 12 minutes or until browned. Turn and fry 12 to 14 minutes or until cooked through (170°F for breast meat; 180°F for dark meat). Drain on paper towels; repeat with remaining chicken.

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### Deviled Eggs

**Ingredients**
- 12 large eggs
- ½ cup(s) light mayonnaise
- 1/8 tsp ground red cayenne pepper
- Salt
- ¼ cup very finely chopped red pepper
- ¼ cup very finely chopped carrot
- 2 tbs. very finely chopped cornichons or dill pickles
- 2 tbs. finely chopped fresh dill leaves for garnish

**Directions**
Place eggs in 4-quart saucepan. Add enough cold water to cover eggs by 2 inches. Heat to boiling on high, cover with lid, and remove from heat. Let stand 12 minutes. Drain and rinse under cold water. Under running water, peel off shells and discard. Trim the tops and bottoms of eggs so that they can sit flat. Cut each egg in half crosswise. Transfer yolks to large bowl, Into yolks, mash mayonnaise, cayenne, and ¼ teaspoon salt until smooth. Stir in pepper, carrot, cornichons, and dill until well mixed. Spoon rounded teaspoon of yolk mixture into each egg-white half. Place on serving platter; garnish with dill. Eggs can be made up to 1 day ahead, then covered and refrigerated.

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### Lemonade

**Ingredients**
- 1 ½ cup sugar
- ½ cup boiling water
- 1 ½ cup fresh lemon juice
- Grated peel of 1 lemon
- 5 cups cold water
- 2 cups ice

**Directions**
In a large pitcher, dissolve the sugar in the boiling water, stirring until dissolved. Add the lemon juice and lemon peel; mix well. Add the cold water and ice, stirring until well blended.

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### Broccoli Salad

**Ingredients**
- 2 heads fresh broccoli
- 1 red onion
- ½ pound bacon
- ¼ cup raisins
- ¼ cup sliced almonds
- 1 cup mayonnaise
- ½ cup white sugar
- 2 tablespoons white wine vinegar

**Directions**
Top 10 reasons To Buy a New iPad:
(adopted/modified from David Letterman Show)

10. Special microchip makes it obsolete 50% faster.
9. Apple will sell it to you for $100 if you tell them “ALA” sent you. (JK)
8. So thin you can use it to chop vegetables!
7. Comes with a camera on the front, one on the back, and one in your lunchroom.
6. Another reason attorneys and staff can contact you 24/7.
5. New app makes any room smell like pizza.
4. No number 4 – Administrator still online trying to purchase iPad.
3. Isn’t it about time you did something for the firm- I mean YOU?
2. Makes life so easy - Administrators can work from anywhere - even vacation!
1. In this economy who doesn’t have $600 to throw around?
Are You Missing Out on Managed Services?

By: Bill Dickinson

Traditional IT support has always been a break-fix process. Often complex environments started out as a couple of networked computers and a few printers. The most IT savvy user was responsible for the IT environment in addition to their own duties. As the needs of the firm grew, so did the complexity of the environment. To make matters worse, security and backups were not priorities, and as such the risk of data loss was very high. As uptime and responsiveness grew, law firms either hired a dedicated support individual or outsourced their needs to an IT support firm. Each support firm added on their own solutions often without removing the old and the resulting environment was both complex and unstable. The IT support firm would wait for an inevitable problem to present itself in the form of a frantic call from a user and then respond to resolve the issue, hence the term break-fix.

This approach is reactive in nature, in that something has to go wrong for support to be aware that a problem exists in the first place. This approach is dated and has several inherent issues.

1. Outages are not scheduled, and therefore users often experience downtime that affects the productivity of the firm.

2. Support is under no pressure to fix the issue quickly and correctly. The more time spent, the more billable hours that can be charged. Support firms are actually punished for doing work correctly the first time.

3. Budgeting is difficult and unpredictable. You may have a month of inactivity followed by a huge repair bill.

4. End users are not in touch with how their issues are being handled. They may trade emails back and forth with the support company, but they don't control the timeframe of their resolution. Furthermore, traditional break-fix requires the user to be kicked out of their seat while they try to resolve the issue.

5. Maintaining records of the environment is a manual process. This includes keeping track of inventory, event logs, purchases and the like.

6. Reporting to management is a time-consuming process. Even if break-fix work is tracked and available, it is a manual process to present that work to management when it comes time to evaluate and budget for your IT environment.

Managed services, on the other hand, is all about being proactive. The firm makes a decision to outsource its support needs for a fixed monthly fee. Managed services provides a 24/7/365 complete view into the health of the IT infrastructure by monitoring for and responding to thousands of different possible issues. This approach includes tools for security patching, anti-virus, anti-spam, and intrusion detection, as well as standard ongoing maintenance such as PC, server and network health, to name a few.

When an issue is identified, it can be responded to in a variety of ways. Response can be automated requiring no customer awareness or intervention, or responded to manually through behind the scenes scripting, remote control and traditional on-site visits.

Managed services has changed the model from a break-fix reactive approach, to one that is proactive. This proactive approach is the next evolution in IT support and improves over break-fix in the following ways.

1. Outages are often able to be scheduled for times that don't impact your business. Since the issue is seen before it becomes a problem, your support firm can often schedule the resolution as opposed to server network or computer downtime. This allows for greater productivity for the firm.

2. Managed services firms are incentivized to provide you the most stable environment they can. They are no longer punished by fixing things the right way so they stay fixed. With flat fee pricing, time spent resolving issues actually eats
into their profits. The emphasis to get things right the first time has now been shifted to your support company.

3. Budgeting is simple as each month there is one agreed upon flat fee. Support is all inclusive, so you know the exact dollar amount going out each month.

4. Ticketing allows the end users to control issue resolution and response times that are convenient for them. They are actively involved in the resolution process, and can work directly with a tech at a time that is convenient. The user does not have to relinquish their seat since the technician has many options available: from behind the scenes scripting, to remote control. Resolutions are tracked and available for reference, saving valuable troubleshooting time.

5. Maintenance of records is completely automated. All resources are recorded and available for reporting when needed. Everything from serial numbers to inventory counts are recorded and available for review.

6. Reporting takes the automated record maintenance and presents the data in a meaningful report for management. Want to find out how many XP machines are still in your network? How about identifying the oldest 10 computers still being used? Reports can be automated and delivered to management on nearly any facet of the IT environment.

With an increasing demand for uptime and responsiveness, the legal community is embracing new ideas for the support of their complex environment. By changing the focus from break-fix to proactive support, firms are able to achieve greater uptime while reducing costs. Managed services should be something you discuss with your IT provider. Don’t miss out.

Bill Dickinson founded Mayflower Technologies in 2012 on the belief that technical ability could be successfully combined with excellent customer relationship skills. Mayflower has brought those skills to its managed service offerings exclusively to the legal community. By focusing on this genre, Mayflower has become attuned to the unique pressures and demands faced by law firms on a daily basis. The company is proficient in legal systems platforms, services and commonly used software unique to the industry. Mayflower maintains a single office in the heart of the Loop to deliver the prompt responsiveness and results that firms expect. Mayflower Technologies can be found at www.mayflowertech.com and Bill can be reached at wdickinson@mayflowertech.com.
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- E-Discovery Services and Consulting

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Accompanying the explosive rise in the variety and functionality of consumer electronic devices, such as mobile phones, tablets and laptops, is the users’ desire to bring those devices into the workplace. Employees are generally more invested in their own devices and tend to be more productive when working on the device of their choice than they would when using firm-issued devices. Additionally, most users take better care of personal devices and tend to upgrade them at a more aggressive pace than their employers do.

In order to manage these personal devices and clarify expectations between end users and corporate IT departments, a BYOD (Bring Your Own Device) policy should be defined.

BYOD policies may vary depending on a user’s role within an organization, but typically should define items including permissible devices, acceptable applications, expense reimbursement/stipend agreements, accessibility to firm resources and, most importantly, security and privacy.

A well-defined BYOD policy allows employees to enjoy the flexibility of being able to select and upgrade their devices without affecting their employer’s IT budget or compromising network security and stability. While many BYOD sample policies and templates may be found on the Internet, development of your BYOD policy may need to include input from department managers and legal, IT and HR departments.

While we may assume that most users will do their best to abide by the rules defined in a BYOD policy, the only way to monitor and enforce specific security policies is through the deployment of an MDM (Mobile Device Management) solution. An MDM solution can ensure that defined prerequisites have been met and enforce policies prior to granting a mobile device access to the corporate network. Sample prerequisites and policies may include:

- Enforcement of password restrictions
- Verification that the appliance has anti-virus installed
- Verification that the appliance has not been jail-broken
- Verification that only approved applications have been installed
- Restrict hours of access to corporate resources
- Disabling of features, e.g., cameras, during work hours

An MDM solution may also provide access to a customized application store that serves only pre-approved, pre-paid applications. Additionally, configuration profiles, in regard to email and wireless network settings, may be pushed to mobile devices, ensuring consistency across devices and thus simplifying troubleshooting and support issues. Via an MDM solution, IT personnel may perform a factory reset or a selective wipe of components on a lost or stolen phone.

MDM solutions are available as in-house or hosted solutions from several vendors, including Cisco/Meraki, Microsoft, MobileIron, MaaS360 (IBM) and Kaseya. While all of these products are feature-rich, the features, functionality and costs vary widely, from free hosted solutions to in-house systems requiring several servers and ongoing maintenance.

The pros and cons of BYOD will vary from one firm to another. While one firm may save money by not having to purchase phones for their staff, another may expend additional financial and personnel resources to purchase and manage an MDM solution. In a BYOD environment, employers need to be reminded that, should an employee leave, so does the mobile device – and the associated phone number. If that particular number was used for sales or as a source of client contact, the issue may be serious enough to negate the adoption of BYOD for a particular service or department.

When considering BYOD for your firm, you should examine current practices to determine to what extent your firm and employees could benefit from the implementation of BYOD, whether from a technical, financial or emotional perspective. If your firm does decide to execute BYOD, be sure to have conversations with your IT and HR departments (or consultants) to ensure your BYOD policy follows best and common practices and the selected MDM solution satisfies the needs of your firm.

Stan Rabin is vice president of technical services at Keno Kozie Associates, a leading national IT consulting firm specializing in the legal community for more than 25 years. Stan has over 20 years of experience in the design, implementation and support of local and wide area networks. He focuses on assisting clients in evaluating their technology with specific attention to design and implementation of data center and disaster recovery environments.
Here you are working and you just had your 65th birthday. You love your job and feel great. You are not ready to retire. However, now that you are 65, you are eligible for Medicare. Do you need it since you have great health insurance? This is an interesting question. As we learned in the Medicare Ins and Outs, it depends. Generally, everyone should sign up for part A when they are first eligible.

Whether or not you should sign up for part B depends on if your current health insurance is considered primary. You should contact social security to request a deferral, if warranted. What you may not know is that once you are enrolled in Medicare, you can no longer contribute to your HSA, according to IRS rules. The financial consequences of not enrolling in Medicare Part A may not be worth deferring part A if you are drawing Social Security. You can continue to withdraw from your HSA. What if you are covered under your spouse’s health savings account at work?

The IRS rule affects only employees age 65 or older who have HSAs through their employment, because they are the ones who contribute to HSAs from their before-tax earnings at work. The rule does not affect covered spouses over age 65 who can continue to use funds from the working spouse’s HSA for approved medical purposes. There are many nuances to just this one situation. You have to make each recommendation on a case-by-case basis. HR professionals are given reliable resources to understand Medicare and how it coordinates with an employee’s current coverage in the Medicare Ins and Outs webinar. Resources include Medicare.gov and SHRM.org just to name a few.
MY NAME IS: Dan Campione

I WORK FOR: Hall, Prangle & Schoonveld, LLC

THE FIRM PRACTICE IS: Celebrating its 12th year, over five of which I have been a part of. Our main area of litigation is Healthcare Litigation/Insurance Coverage defense.

MY TITLE IS: Firm Accountant

BEFORE BECOMING A FIRM ACCOUNTANT: I started in the AP position (1.5 yrs.), then was promoted to Billing Specialist position (2 yrs.).

I HAVE BEEN WORKING IN THE LEGAL FIELD FOR: over 5 years.

I HAVE A BACHELOR’S DEGREE IN: Communications from Monmouth College.

I JOINED ALA CHICAGO CHAPTER BECAUSE: I wanted to learn more from others. The resources of the ALA are boundless and allows for the networking of ideas with others in order to learn new and effective practices.

TO BE SUCCESSFUL IN LEGAL ADMINISTRATION:
1) You must be resilient;
2) Be adaptable to the constant change within the legal world;
3) Maintain the “critical eye” for details and question everything!

THE THING I LIKE BEST ABOUT BEING A FIRM ACCOUNTANT IS: The everyday tasks that expand my role into various others allowing me to learn something new every day, thereby further developing me into a well-rounded professional.

ONE OF THE CHALLENGES OF BEING IN LEGAL ADMINISTRATION IS: Keeping up with the constant changes in all aspects of the legal field.

THE BEST ADVICE I’VE EVER RECEIVED IS: “Never mistake kindness for weakness.”

THE BEST ADVICE I WOULD GIVE TO SOMEONE WHO IS JUST ENTERING THE LEGAL MANAGEMENT FIELD IS: Take notice of the differing personalities you’ll interact with every day; each individual will require a different approach to an issue.

I TRY TO MOTIVATE MY STAFF BY: Leading by example, staying positive and encouraging them to ask questions and learn by understanding.

IF I WEREN’T A FIRM ACCOUNTANT, I WOULD: Pursue a career involved with the outdoors and protection of animals.

THE LAST GOOD BOOK I READ WAS: “Strengths Based Leadership” by Tom Rath & Barry Conchie.

THE LAST GOOD MOVIE I SAW WAS: The Grand Budapest Hotel.


THE ONE APPOINTMENT I NEVER MISS IS: Swimming practice.

IN MY FREE TIME, I ENJOY: Socializing with family & friends, outdoor activities/sports, charity/fundraising motorcycle rides (such wonderful experiences & people), video gaming and seeing new places.
We have all heard this whispered more than once: “A real challenge in today’s world is keeping up with technology.” This is a self-evident truth that probably wasn’t uttered much twenty years ago. Keeping up requires time, patience and skill we are all developing: finding new ways for technology to serve us. Law firms today are required to drive more billable time with a shrinking support staff and this is prompting them to vet and integrate more technologies that empower. The directive today: find new ways to leverage technology and processes to positively impact efficiency and cash flow.

A good place to start is with the low hanging fruit – documents. Either on printed wood pulp or stored as 1’s and 0’s, documents are the life blood of the law firm. Contracts, briefs, discovery, position papers, management reports, budgets and billing all pump through the legal circulatory system. Documents in law firms are omnipresent, crucial for survival and an excellent place to look for areas of opportunity… and yes, Zen.

Let’s focus on three areas where we may be able to help achieve a state of centeredness:

**The Hard Stuff, Paper:** As much as we talk about the eventuality of the paperless society, in the here and now, paper is still very much a part of the process. In most cases, managing electronic documents is much more efficient than getting up and pulling paper from a file. In 2014, paper is still required for many tasks and can be more efficient for others; therefore, we still must engage with printers, toner and the like. You may have heard this oft cited quote from Gartner, “Printing costs can equal up to 3% of an organization’s gross revenue and represents a huge opportunity for savings.” Especially for larger firms, actively managing their print environment can represent big gains in efficiency and cost reduction. This includes optimizing the print fleet, automating service and supply, and consolidating billing.

Nowadays, it’s not uncommon for managed printers to order their own supplies or to alert a service provider to provide proactive maintenance. Print management software, such as Printfleet, takes printer centric, manual tasks such as managing a toner closet and calling for service and automates them. Service and supply automation could be the lowest of the low hanging fruit because it is the easiest to implement and there is no upfront capital expense. The software is typically provided for free, included within a printer’s supply/service agreement.

Couple automation with a competent, local support provider and you shouldn’t have to expend too many calories worrying about printers… their care, feeding or replacement.

**The Soft Stuff, Workflow:** The Wikipedia definition of workflow: “Workflow consists of an orchestrated and repeatable pattern of business activity. The flow may refer to a document, service or product that is being transferred from one step to another.” Efficient workflows for the legal industry involve converting more paper documents to digital ones across all legal activities. A key component in a zen-like workflow is automation – taking manual repetitive tasks and removing as much human involvement as possible. Automation is particularly important in the legal industry as many document processes within case management are highly repetitive and a Document Management Solution (DMS) that can streamline and automate those offer considerable cost savings.

The sheer number of DMS’s out there is as plentiful as the firms they serve. Systems range from cloud-based subscription models, to copier centric systems, to ad hoc, home-grown systems. Choosing and implementing the DMS that fits your needs can be a daunting and challenging directive, but it is one that has high ROI potential.

As Steven Best, CEO of Best Law Firms Solutions, puts it, “The concept of document management, while having been around for a long time, has morphed itself into many different forms…When data looks more like clutter and is, therefore, unmanageable (files piled in office closets, under desks, and on top of credenzas, or three feet high on a desk), it is time to organize and clear it out; staff members become less productive, overhead costs increase and profits, ultimately, decrease. Investing in a document management software system balanced with maintaining a minimal amount of original records as required by statutory or authenticity requirements, will help everyone in your firm work smarter, faster, and more productively.” We can all relate to what Mr. Best describes because a cluttered environment will clutter you mind.

**Counting Cents, Cost Recovery:** Cost recovery is a well-established practice in firms: charging clients for actual expenses incurred on behalf of clients. Opportunities are available if the practice is not up to date with technological advancements in tracking and recovering reimbursable costs. Cost recovery software programs such as Equitrac and PaperCut assign billing codes to print and scan activities at the desktop, neatly capturing and reporting reimbursable expenses for all print, scan and copy activity.
According to Equitrac, the increasing shift to electronic documents has had an unforeseen consequence, “The majority of today’s documents are created, modified and distributed electronically. Many of those originate as paper documents and are converted to electronic files. The unintended, but very real effect of this shift of electronic workflow is that more documents are being printed out multiple times during their lifecycle. This trend creates a dilemma. While print and scanning are the fastest growing document related activities, the costs of those activities are not being billed to the clients.”

Firms who do not want to charge back for print or scans can use a strategy employed to reduce general office print costs. This includes routing large jobs to a more efficient device, employing two sided printing, enforcing monochrome printing or deploying other rules-based options that make printing more efficient. Rules-based routing software does the work in informing the user’s decision on how and what is printed. It’s like big brother but with good intentions and a gentle touch.

With rules-based routing software such as PaperCut, every time a user clicks print or chooses not to print, their behavior is rewarded by calculating the cumulative fiscal and environmental impact. Rewards pop up in boxes tabulating the dollars, trees and energy they have saved their firm and their environment. Before you know it, the warm fuzzies start to present themselves.

Whether expanding cost recovery to include print/scans or including rules-based routing to drive cost reduction, a variety of software tools are available to make print more efficient and cash flow friendly.

Choosing ways to streamline documents, to increase their productivity and to lower their handling costs requires varying levels of due diligence, but the opportunities for improvement are vast. Unfortunately, there isn’t an old man on a mountain top directing us where to go, someone to look to for support and what solutions pack the biggest bang for their buck. Again, keeping up with technology is a challenge. As Mary Lou Rago, firm administrator for Kubasiak puts it, “Things are moving so fast, it is tough to know what is useful to us and what is just cool, because there are things that are cool, but not terribly important to us, and we need to know the difference.”

Everyone is trying to put a little more Zen into their lives. It isn't easy, lives are hectic, more is being asked of us and technological improvements continue to come in at faster successions. Focus on the easy stuff first, keep looking for an edge and continue to nurture that wise sage within who has the answers that everyone in the firm is looking for…best of luck.

Jeff Armstrong is the owner of OutSource Technologies, a print and toner support provider based in River North. Jeff is an outdoor enthusiast, who loves to spend time with his family and their smiling yellow Lab Leo.
Office Technology is always advancing, pressing for speed, accuracy and efficiency. To stay at the cutting edge requires careful investment in systems and service, with decisions based on thorough evaluation of the return on that investment. The IT needs and objectives of every office are unique. An important key to a successful technology provider partnership is a complete and mutual understanding of these unique needs and objectives, leading to a custom solution.

When making decisions, it is important to know your technology provider partner’s level of qualifications, certifications and capability in delivering Best Practices, and the commitment to consistently re-certify in order to stay up with continuous technology evolution.

INDUSTRY CERTIFICATION ORGANIZATIONS – VENDOR SPECIFIC VS. INDEPENDENT CERTIFICATION
There are two general kinds of Certification, each important to understand.

Vendor Specific Certifications are sponsored by vendors who are interested in qualified technicians in the field to work with their specific product line. Companies such as Hewlett Packard, Cisco, SAS, Oracle, Microsoft, Apple and Samsung all sponsor certification programs to work on the products they have in the field as well as new products being introduced.

The benefit of Vendor Specific Certification is that if you are committed to one vendor, these Certifications insure that techs are deeply trained in the one vendor’s range of products.

Of course the other side of that coin is that other vendors may be creating best of class innovation, of which your tech may be less aware.

The real benefit of Vendor Specific Certification is that in each market, vendors identify the best local resources for warranty work, and that should be among the questions asked in evaluating a local technology partner “… Is your organization identified by national vendors to do their warranty work?”

In looking at Independent Certification Organizations, there are several that stand out as consistently excellent, operating across a range of disciplines and vendors. VM Ware, Citrix and CompTIA appear to cover the broadest base of technology, with CompTIA distinguishing itself as a recognized industry leader. CompTIA stands for The Computing Technology Industry Association, founded in 1982, and you can find additional information at www.comptia.org.

AREAS OF CERTIFICATION
Areas of Vendor Neutral Independent Certification include Managed Print Services, IT Training, Help Desk, Systems Administration, Networking, Data Security, Data Storage and Retrieval, Cloud IT, Mobility, Governance Software, Enterprise Architecture, Hardware and Project Management, among others.

BEST PRACTICES IN RE-CERTIFICATION
Your technology provider is your connection to the latest innovations that can improve efficiencies in your office. With technology advancing every day, it is important that Certification be viewed as an ongoing process. Your technology provider should be able to demonstrate a consistent Re-Certification commitment. This is an expensive process, absolutely essential in delivering maximum value.

Rigorous Re-Certification starts with being broadly plugged into the industry, close associations with all of the vendors, and being a leader can mean Independent Certification Organizations being asked by vendors to evaluate new products in terms of service and delivering improvements promised, as part of the development process.

INDEPENDENT CERTIFICATION ORGANIZATION CONTRIBUTIONS TO THE IT INDUSTRY
Independent Certification Organizations have emerged as something of a central clearing house of data and facilitation from vendor, through IT provider to end users and back again. It is not unusual for a Certified Tech in the field to observe a particular problem or improvement opportunity, working
with end users, communicate that observation back to the Certification Organization, who in turn communicates the opportunity back to the vendor. These communications are facilitated through numerous industry trade shows, lectures, conferences, websites, forums and blogs, which have developed as vendors and IT providers make the most of the numerous lines of direct individual and community means of interface.

Collaborative, interactive training is constantly updating content to stay up with the rapid changes that are always being introduced.

**INDEPENDENT CERTIFICATION ORGANIZATION RESEARCH**

Independent Certification Organizations produce a steady stream of IT research and market intelligence studies providing members with timely, relevant data and assessments that can be put into action in the field on the one hand, and fed back to vendors on the other. Data from tens of thousands of end users on a wide range of issues cover technology trends, under served needs, channel dynamics and the end user IT workforce. The research informs channel training and forecasts new industry trends and opportunities.

**INDEPENDENT CERTIFICATION ORGANIZATIONS & PUBLIC ADVOCACY**

Certification Organizations champion public policy priorities that impact the entire IT Industry and end user community.

These Public Policy Advocates are constantly involved in federal commercial policy, as well as state, local and international technology policy. The focus is on issues that accelerate the innovation cycle, build a 21st Century technology workforce, and the maintenance of a secure, open access internet.

In addition, these process participants evaluate emerging regulatory trends, and work with legislators to assure that solutions to issues raised address specific challenges without unintended consequences that might constrain essential technology development.

Finally, the focus on Public Policy includes thorough communications of issues and changes within the industry, and soliciting feedback from a broad cross-section of professionals and end users to assure all perspectives are considered.

**INDEPENDENT CERTIFICATION ORGANIZATION PHIANTHROPY**

There is a current shortage of 300,000 IT Professionals in the United States, and demand for qualified Techs continues to grow.

The IT Futures Foundation, a 501(c)(3) tax exempt non-profit organization, is dedicated to proactively finding and developing the talent needed to fill this void, with specific emphasis on providing opportunities for motivated and intelligent individuals from modest or disadvantaged backgrounds. This organization is working hard to narrow this talent gap.

So, the opening question stands “… Are your technology providers certified?”

It will be very worth your while to thoroughly answer this question. Not only do you want to ascertain your technology professional’s level and type of Certification, but you also need to know how current that Certification is.

Is the provider certified by an independent service, or is the certification vendor specific? Is the organization identified by vendors as a field warranty provider?

Answers to these questions will go a long way toward assuring that your ongoing technology investments will be successful.

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 with any questions.
Law Firm Leaders Breakfast Recap

CultureShift: A Whole Firm Approach for Generating Greater Client Loyalty and Growing Revenue

By David H. Freeman, J.D.

If you were to eavesdrop on an Executive Committee meeting in a typical law firm, you very well could hear some version of the following conversation: “We have excellent lawyers, but the market for our services is not what it used to be. We’ve cut all we can from our overhead. How can we get our lawyers focused on developing more business?”

One of the greatest challenges facing firm leaders is guiding lawyers to change their behaviors in ways that will maximize personal and firm-wide business development potential. Facilitating such a culture shift requires a level of institutional effort, coordination and relentless follow-through rarely found inside today’s firms.

Anyone who has tried to change a culture knows it is a monumental task. Impassioned speeches by firm leaders about increasing cross-selling, delivering better client service, finding more profitable clients and generating 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 and tirelessly 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 within a firm, you’ve probably run up against a 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.

Underlying many of these challenges is the need for buy-in and agreement. As you have painfully experienced, you can’t tell most lawyers what to do and expect they will automatically do it. They need facts. They must analyze, dissect, challenge and explore other approaches. Ideas must be their ideas, and they must act in sync with others to achieve the potential synergy that exists within your firm.

One way to generate buy-in and consensus is by putting your lawyers through a facilitated, collaborative planning process. They will work together to analyze their problems and develop joint solutions. They will develop a greater sense of ownership around achieving the outcomes they agreed were important. By using this approach, not only will you focus their attention and energy, but you will also set the stage for better implementation down the road.

MAJOR DRIVERS OF CULTURE CHANGE

Within the planning process, you must carefully choose and blend initiatives at the right time, in the right way, to encourage 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 create a more powerful, self-sustaining culture of client development:

Senior Leadership Alignment and Planning

- 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 system for consistently acting on the 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 the compensation system to encourage desired behaviors
- Focus on high potential clients
- Train group leaders how to drive the process
Lateral Integration
- Develop a strategic acquisition plan
- Build a structured integration process
- Require laterals to create personal client development plans
- Improve lateral selling skills
- Appoint lateral mentors who provide guidance and 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

IT’S ALL ABOUT IMPLEMENTATION
Simply developing a plan is never enough. The most important and often underrated part of any real change effort lies in creating a defined process for driving ongoing implementation. In a law firm setting, this requires the consent of the lawyers to be managed. They must understand their roles, develop clear action plans, adhere to specific deadlines and give their permission to be “watched.”

This role of the “Watcher” can be fulfilled by a single person or group, whose job it is to remind, cajole, prod and hold people accountable for their commitments. To gain this power, include in your collaborative planning process a frank discussion of the roles and responsibilities of all players – the leaders and the led. You should also agree upon policies and procedures that give your leaders the authority to do what is needed to get plans implemented.

CHANGE IS HARD – BUT THE FUTURE WILL BE HARDER
Culture change is extremely demanding work. You need the trifecta of leadership, planning and process, mixed with an unprecedented level of firm-wide commitment. The Managing Partner must become the Chief Sales, Watcher, Cheerleader and Carrot and Stick Officer. Group Leaders must have the stamina and skills to drive sustained action in their groups. And every lawyer must become more client-focused and team-oriented.

The truth is, many firms are not ready for this kind of commitment. Those that don’t, however, risk falling behind the client-focused juggernauts who will blaze the trail as the successful law firms of the future.

David H. Freeman, J.D., Chief Transformation Officer at CultureShift®, and CEO of the David Freeman Consulting Group, has been recognized as the best law firm coach and consultant in National Law Journal Surveys for the past three years. For twenty years, he has shown thousands of lawyers and leaders at hundreds of firms world-wide how to grow their practices. He can be reached at David@LawFirmCultureShift.com, or 949-715-0819.
LEGAL BUSINESS AND TECHNOLOGY CONSULTING SOLUTIONS

Project Leadership Associates (PLA) is the largest provider of business and technology consulting services focused on the U.S. legal market. Since 1998, more than 450 law firms and corporate legal departments have engaged PLA to employ our proven expertise.

We deliver cost-effective legal solutions by combining industry-leading technology knowledge with our deep understanding of strategy, people, processes, and legal operations.

OUR SERVICES

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- Plan and execute operations and litigation strategy, implementation and outsourcing
- Leverage efficiencies via legal project and matter management

BUSINESS OPERATIONS
- Save money and protect shareholder value through effective quality processes and risk management and general cost reduction
- Provide cost-effective eDiscovery collection, processing, analysis, review and production services
- Review, recommend and re-engineer corporate legal department best practices and operations

APPLICATIONS
- Select and implement software solutions designed for legal teams
- Develop and deliver legal intranets, extranets and websites

INFRASTRUCTURE
- Test and deploy new and upgraded technologies
- Support legal technology and IT functions in insourced and outsourced environments
- Upgrade to current versions of Microsoft Office, Windows, Exchange and Lync

For more information about PLA’s Legal Solutions, contact Dan Safran at dsafran@projectleadership.net or call 312-441-0077.
ALAs Business of Law Conferences

ALAs new Business of Law Conferences provide the crucial education for strategy, innovation, profitability and leadership – in full force this fall.

Flexible schedule offers consistent, cutting-edge education in key locations:

**September 4-6, 2014 (Thursday-Saturday)**  
Hilton Portland and Executive Towers, Portland, OR

**September 11-13, 2014 (Thursday-Saturday)**  
Palmer House, Chicago, IL

**October 6-8, 2014 (Monday-Wednesday)**  
Renaissance Worthington, Fort Worth, TX

**October 27-29, 2014 (Monday-Wednesday)**  
Sheraton, Philadelphia, PA

**Specialty Conferences**

**Intellectual Property Conference for Legal Professionals**  
September 18-19, 2014 (Thursday-Friday)  
Westin City Center, Washington, DC

**Large Firm Principal Administrators Retreat**  
September 18-20, 2014 (Thursday-Saturday)  
Waldorf-Astoria, Orlando, FL

**ALA Corporate Law Department Symposium**  
October 15, 2014 (Wednesday)  
Thomson Reuters Building, New York City, NY

**Human Resources Conference for Legal Professionals**  
November 3-5, 2014 (Monday-Wednesday)  
Paris Las Vegas Hotel, Las Vegas, NV

For more information, visit alanet.org/events.
On June 4, 2014, the Greater Chicago Chapter hosted its annual Law Firm Leaders Breakfast at the Union League Club of Chicago. Close to 100 members, guests, and business partners attended the event, which featured speaker David H. Freeman, J.D. presenting his program *Developing an Owner Mindset: Leadership Techniques for Engaging Partners to Drive a Client, Teamwork, Revenue and Profitability Focused Culture.*
ALA MEMBER SURVEY: PRODUCTIVITY AND PROFITABILITY TOP OF MIND

UPS surveyed 450+ attendees at the 2013 Association of Legal Administrators (ALA) National Conference to uncover the most pressing business and operational challenges and key focus areas of law firms in the future.

TECHNOLOGY & EFFICIENCY

The greatest day-to-day challenges

- 56% Time management
- 46% Managing costs & expenses
- 30% Office inefficiencies & technology issues

Key focus areas for law firms in 2013

- 49% Client service
- 47% Business development
- 41% Cost management

MARKETING & BRANDING

- 49% Nearly half of ALA members surveyed reported that their firms plan to invest in technologies in the next year to increase competitiveness and grow their business
- 31% Reported marketing and branding as a key focus in 2013
- 46% Will invest in marketing and branding in 2014

DIGITAL VS. PAPER

- 31% Following general correspondence items, invoices and court briefings are the most common documents moving to digital formats
- 47% Invoices
- 41% Court briefings

- Overnight shipping is essential for contracts and client proposals, which are the documents least likely to move to digital formats
- +50% More than half of respondents report that printing a firm’s logo or branding on an express shipping envelope is beneficial

For more information on UPS services and solutions, contact:
Anthony Perrino at 630-800-6654, aperrino@ups.com, or visit ups.com/professional.

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