

THE ADMINISTRATOR'S ADVANTAGE

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November / December 2009

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November/December 2009

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ALA Mission Statement:

The Association of Legal Administrators' mission is to improve the quality of management in legal services organizations; promote and enhance the competence and professionalism of legal administrators and all members of the management team; and represent professional legal management and managers to the legal community and to the legal community at large.

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President's Message



Budgeting is Not Just About the Dollars

As we close another year, we wonder where the time went and how we got to the end of it so fast. It seems in the last three months of the year, we try to tie up all the loose ends so we can finish the year on a good note and aim to start the new year with a clean slate. In the midst of wrapping up the year and responding to the normal everyday issues, we also have to set time aside for the year-end events. These events may include a myriad of items: budget preparation, holiday parties, employee reviews, gift buying, holiday card preparation, family gatherings, school closings, and, not to forget, the start of the cold-weather layering. As indicated in a few of these year-end events, it seems we take stock of our finances at work and at home. We review what we have and have not. We want to be able to do right by all, but sometimes the belt has to be tightened, as we know that three more months of winter follow December. Those three months, for which we need to budget financially, mentally, emotionally, and physically, are when the winter doldrums occur.

We get through the last quarter with the hope and expectation of the forthcoming festivities. We experience the light-heartedness that comes with the spirit of the holidays, which includes the decorations, the music, and the child's delight. While we are in the midst of these events, we continue to focus on our fiscal needs. At work, we aim to wrap up the current year's budget while creating next year's budget, too. At home, we look to see what we can afford to spend during the holiday season and what needs to be reserved for the coming year. We check our lists and check them twice. For both work and home, we want to make sure the income and expenditures are balanced. When preparing the budget, I do suggest allowing for those unexpected expenditures – a party for no reason and, of course, that great post-holiday sale! These inclusions may be just the ticket in order to look forward to winter.

While we budget financially, it seems that we have to also budget for our mental and emotional well-being. With the heightened expectations of the holidays, come the gray winter days thereafter. We may experience an emotional let down either at home or at work or at both. It is not unusual, as we do have shorter days of sunshine and, after the rush of the holidays, our adrenaline decreases, and we may feel a little low. (The sugar high can only last so long!) Therefore, with some preparation and planning, we might be able to add hope and sunshine to the gray days. At work, budget for a pizza party or, better yet, have a group potluck to break up the gloom and doom months and engage in some team collaboration. At home, plan for a day or two off and add some fun, like playing some board games, visiting a town that you never have been to, or throwing an impromptu gathering. As you budget your money, also budget to allow for some mental and emotional relief for those months following the holidays.

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Your fiscal budget looks good, and you have set up ways to maintain a healthy mental and emotional state. Now you are ready to forge ahead and begin the new year with a burst of energy. That brings us to the third area to budget for, which is physical health. Personal physical health is making sure the right foods are being eaten, the walks are being taken, and the right amount of sleep is being obtained. From a firm's point of view, physical health can be seen not only from a financial standpoint but the physical state of its facilities or its various departments. Does the office need painting or carpet need cleaning? Does a department need to be re-energized? These aspects all need to be included in the overall budget to maintain the services that the clients have expected to receive and have its employees wanting to come to work. Taking stock of the physical health and then planning to enhance it will further strengthen the other areas, so that the winter months may be enjoyed, as opposed to being dreaded.

Remember, if one cog of the wheel is weak, then all the cogs will weaken, too. Therefore, when you budget, just do not think in dollars, but also think what else keeps the wheels inflated and going round and round. Consider all the components that make for a successful business or a successful you. When you are tired, you know you are not performing at the best level for you or anyone else. When there is any type of conflict at your firm, productivity is drained. It is amazing how easy it is to budget financially, but to budget for those less tangible items takes some effort and creativity. Go ahead and prepare your fiscal budget, but also include in the budget ways to keep your personal (or your firm's) mental and emotional and physical health strong in 2010.

On a side note: I am interested in knowing what you have "budgeted" for yourself or your firm besides the financial aspect. Therefore, email me, so we can share them in a later issue:

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By Diane Brummel
Director of Office Services
SmithAmundsen LLC



Season's Greetings
from the Newsletter Staff





Use Your Marketing Dollars Wisely

By Nancy Roberts Linder

When it comes to budget justification and implementation, the key is not what's in the budget but the activities upon which the budget is based. Being able to demonstrate that the marketing activities in the budget drive revenue back to the firm is the key to getting the resources needed for marketing. While it may be hard or impossible to link new business to a result of certain marketing initiatives, there are obvious ones that can be tracked effectively – client meeting initiatives, business pitches, firm organized seminars, advertising, law news updates – are all good examples.

Additionally, there are several areas a law firm administrator can look to reduce or control marketing expenditures. Here are a few of my proven favorites:

Professional Directories

There seems to be a new directory targeted at law firms being published every year, including those available via the Internet. Many of these directories offer free initial listings, but beware of future costs, which can range in the thousands of dollars, particularly the web-based directory listings. A strategy that works – identify the one directory in a particular market that the professionals in that industry use as a resource. The best way to obtain this information is for attorneys to ask their clients or referral sources which directories they find useful.

Telephone Directories

For the great majority of ALA-member law firms, clients are not scanning telephone directories to find a lawyer. Take a close look at what is being spent on telephone directory listings for both the firm and individual attorneys. In my days as a marketing director for a 300-attorney firm with 16 offices, I found that the firm was spending nearly \$70,000 per year to have attorneys listed in the yellow pages. By adopting a strategy of listing the attorneys in the white pages and having a firm name only listing (no additional line listing) in the yellow pages, the total cost was reduced to \$15,000 per year, a \$55,000 savings. The Internet has largely replaced telephone directories as the primary commercial and consumer research tool.

So say “no” to paying extra for bold type listings. Rather, commit to the bare minimum listings needed to ensure that you and your firm's lawyers are listed with directory assistance.

Printed Materials

Printing costs for marketing materials, which include the firm brochure and practice/capability pieces, can be dramatically reduced by employing technology. Website technology has evolved to the point that material on a firm's website can be compiled into a custom template and saved as a PDF, which can be easily emailed to a client or printed out on a color printer for a prospective client presentation. Additionally, a firm's photocopy equipment can be used to produce high quality print materials that are bound in-house, doing away with expensive and time consuming commercial printing projects. Here's a cost-reducing strategy that works: invest in a professional binding system, and generate marketing materials in-house, using pre-printed marketing paper or letterhead and a professionally designed and printed document cover or folder system. This strategy allows for the marketing material to be customized, based on the recipient and purpose (business pitch vs. informational follow-up), and eliminates the cost of content layout and reprinting.

Nancy is the Principal of Nancy Roberts Linder Consulting, a law firm business development and client relationship management consulting practice, located in suburban Chicago. She can be reached at 708-482-0760 or via email at nrl@nrlinder.com.



How My Firm Handles the Increasing Complexity of Getting Our Bills "Out the Door"

I don't know about the rest of you, but I have realized this year that getting our bills out the door at our firm has become increasingly complex. Here's just a little background. My firm is a 17-attorney litigation practice. We have insurance company clients as well as corporate clients. We have a large number of clients overall, which is good for diversifying a practice, but extremely challenging to keep track of all of their litigation guidelines, billing requirements, etc. As for support staff, we have six secretaries, a receptionist, three law clerks (who relieve reception, go to court, do hand deliveries, manage inventories of both office and kitchen supplies, and do the internal physical, as well as electronic, filing), one paralegal, and one billing clerk.

What we have done in my firm is to start spreadsheets and tables for all of the various requirements of our clients. One is based more on litigation and file handling, which is updated and given to all of our secretaries. The other table contains a listing of all the clients and their preference for billing, as well as a general list of what expenses they will or will not accept. I keep a third spreadsheet which is broken down by category and contains all of the user names and passwords required for various vendors and e-billing platforms. We have no less than 15 different e-billing companies that we must submit to in a given month.

Most of our clients are billed on a monthly basis, but we do have a few that still want quarterly billing, so our billing cycles are always a little bit different. We have four different review processes that our bills go through. First, they are reviewed by the billing clerk, who checks off what expenses the client pays for and makes sure that we are billing the correct amount for those expenses. They are then distributed to each partner, who reviews his or her own bills each month. After this is done, the bills are turned into one of our partners, who does an additional review to catch such things as making sure we have billed travel expenses when there is a time entry for appearing somewhere for either a court appearance, deposition, or meeting. He also makes sure that each entry adds up to the correct amount.

The bills are then reviewed by me to make sure the proper codes are being used, the billing rates are correct, and the expenses are in order. The billing clerk then corrects and prepares all bills for submission. Two copies of the "paper" bills are printed and then the receipts/backup are attached. For the e-bills, we prepare one paper copy and scan all receipts to our network in an organized manner, so they can be uploaded with the bills at the appropriate time.

I make sure all the corrections are done and then approve the bills for sending. I group the bills by client, so that we can be as efficient as possible in either mailing them out or submitting them. The submission process is also complicated. First, the bills go through an internal audit through our billing system and then are saved as a text file to our network. Some of them then need to go through another conversion process to get them in the right format for submission.

Then I log onto each billing site and upload all the invoices for that client together, uploading the receipts as well. Lastly, the bills are approved in our billing system and then filed away. After that is done, we usually get an email stating whether the bill has been approved in full or whether any deductions have been taken.

It is then my responsibility to contact the partner on the file to make a challenge to any deductions. This needs to be done in a timely manner, so that we do not miss out on the opportunity to challenge anything before the deadline to do so. We find it very important to collect as much of the original bill as possible and have been very successful in doing so.

As you can see, this is quite a time-consuming process, and I am always looking for ways to improve our system. As automated as it seems, it still requires quite a bit of old-fashioned manual labor to submit these bills. As we all know, money does not just come in the door, you have to submit a bill to make that happen.

I hope that I have imparted some appreciation for the billing process and provided some ideas to streamline your billing process. This is a particular challenge for the smaller firms, when there usually is very little manpower to get the job done.

By Mary Lynn Wilson

Legal Administrator

Cray Huber Horstman Heil & VanAusdal LLC



Developing a Disaster Plan That Works

On October 21, 2009, Shefsky & Froelich hosted a webinar entitled, “Stepping Out of the Rubble: Developing a Disaster Recovery Plan that Works,” which was sponsored by the Association of Legal Administrators. The webinar was well attended by colleagues from several firms throughout Chicagoland. Both speakers, Ray Lithtell, Jr., Chief Operating Officer of Galloway, Johnson, Tompkins, Burr & Smith, PLC, a 90-attorney firm with offices along the Gulf States, and Kathryn Scourby, Business Continuity Manager for Hunton & Williams, LLP, which has 19 offices, all in hi-rises in major cities worldwide, have each lived through major disasters and were eager to share their successes as well as their misses.

We all intellectually accept that disaster can strike at any time in any place even if we don't live in, on, or near a potentially dangerous natural disaster zone. Why then, do we also believe it will never happen to us?

Louisville, Kentucky, doesn't usually have floods; Atlanta, Georgia, isn't a frequent target of tornados. A company in Chicago was completely devastated by a hi-rise fire; another Chicago firm sustained major damage due to a leaky pipe, which resulted in hundreds of thousands of dollars worth of damage; hundreds of business losses were sustained due to the Chicago flood. As we all know, in the case of the hi-rise fire, there was also, sadly, loss of life.

For this firm and the many others that have been affected by similar disasters, the lesson learned is that disasters can strike at any time. Having a well planned, *tested* and re-tested disaster recovery/business resumption plan in place is absolutely critical to surviving after a major disastrous event occurs. There was no more compelling lesson learned than the one we all witnessed on 9/11.

It's not just the major events that cause such destruction; oftentimes the most common disasters begin because of something small, such as a Commonwealth Edison generator exploding down the street or a city worker damaging power and

communication lines. Since 9/11, it has become increasingly clear that we all must plan for these types of unexpected interruptions as well. Consider the pandemic warnings we have all been receiving this year. The flu has the potential to virtually shut down a firm.

The goals of the program were to:

- Identify potential obstacles to creating a disaster plan;
- Analyze the individuals at the firm who are critical to creating the plan;
- Summarize the funding necessary to implement a plan; and
- Finally, develop and test the plan.

To summarize, it is not just good enough to create a plan; you must test it regularly and often in order to identify the flaws. You must also regularly train and re-train those people who are identified as key players. It is critical to analyze the test results and modify your plan, as needed. Preparation can save lives.

In order to create an effective plan, you must have support from the firm's leaders. A tip was offered, to wit: Put disaster recovery in the budget as a line item, and continue to get buy-in from the people who matter within your firm.

Figure out potential lost revenue for one week, computing billable hours by the number of attorneys in the firm. Present that number to your executive committee to begin a dialogue about the importance of disaster recovery.

Although universally accepted as an IT issue until recent years, understand that creating a disaster recovery plan comes from a collection of individuals throughout the firm, all equally committed. A crisis team should be set up in the beginning to effectively think through all areas of operations. An urgent suggestion to “do this immediately” was echoed by both presenters.

(continued on page 11)

We didn't get the Olympics, but we got ALA Region 3 Conference!

Chicago or Bust!

Save the Date!

October 14, 15, and 16, 2010,
at the Drake Hotel

It's the only game in town,
and we get to be part of it!

(Photos are from Region 3 Conference in St. Louis, October 8-10, 2009. Our table theme was candies made in Chicago.)



Your help will be needed, as we want to show all the attendees a warm Greater Chicago Chapter welcome. Be on the lookout for emails requesting volunteers, as we will need your support.

Put in your 2010 budget to attend this conference. We have over 300 members, and we would like to see all of you there! If there is something that we as a Chapter can do to aid in having you attend, please let a board member know.

We want to see you in this Chapter conference photo in 2010!





(continued from page 9)

In addition to having up-to-date telephone trees and lists of emergency numbers available, they suggested also having HR policies in place about how to handle various HR issues during an office shut down. In addition to communicating with your own employees, they also suggested that all partners be in a position to “work the phones” quickly to communicate with clients to reassure them once a disaster occurs. One other important point was to be sure that your firm has business interruption and property insurance.

It is impossible to share all the important, relevant information these two speakers provided. The real lesson they wanted to be sure we all took away was that disasters do happen. Don't allow your firm to be caught by surprise. Plan, plan, and plan some more – testing and retraining key personnel all along the way.

By Georganne Binnie
Firm Administrator
Shefsky & Froelich

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The Values of Diversity

Tolerance and appreciation of diversity means understanding and valuing differences, while drawing on similarities to achieve a common goal. In the legal industry, we develop our firms/ departments and way of doing business to reflect the diversity of our staff, clients, and communities. We do this by recruiting and developing top talent that blends the participation of all into the management of our business. It also builds the economic wealth of the communities we serve by providing open opportunities and fair competition.

To be truly committed to diversity, as Administrators we must lead the embrace, be committed to inclusion, be willing to take some risks, and

measure progress. Diversity in our workplace, in community outreaches, and in our business partners/sponsors is everyone's responsibility.

Diversity is a corporate priority. To be successful, each of us must apply our talents, tap into our personal networks, and leverage our resources. Together, we create opportunities that fully engage our employees, our clients, business partners, and communities. An inclusive and collaborative environment helps our businesses and communities grow and prosper.

By Mark A. Bridgman, CLM
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Employee Commitment in Difficult Times

At the Region 3 Educational Conference in St. Louis, I attended the HR session, “Re-Energize, Enrich, Re-Deploy: Cost Effective Ways to Enhance Employee Commitment.” The speaker was Wendy Werner from Werner Associates, LLC.

Werner discussed how the current work climate is disheartening to employees, with all the frequent layoffs, pay cuts, and furloughs that are happening around us. She reported that three surveys — Quantum, DDI, and Salary.com — all indicated in some shape or form that employers are facing a steady decrease in employee engagement. Quantum indicated a 66% decrease in engagement from a 2007 to 2008 comparison survey. DDI’s Employee Survey noted that of 1,000 non-management employees, 50% indicated their careers were stagnating or were in limbo. According to Salary.com, employees reported they are more stressed during the work day, resulting in increased personal calls, Internet use, and socializing with others to deal with their daily work stressors.

Werner had the following two questions for the administrators in the room: 1) “Do you want your employees to be better at what they are good at?” and 2) “Do you want your employees to stop doing things wrong?” Werner stated if administrators wanted to re-energize their staff they had to focus on what they do well rather than harp on what they do wrong. The first step in re-energizing your staff is trying to re-energize your firm culture. We all know changing the culture of a firm is not an easy task. Werner suggested administrators can succeed by offering staff low cost benefits that will help improve the firm culture while simultaneously providing employees the autonomy, purpose, and empowerment they are searching for in the work place.

Support for Employees’ Outside Interests

One low cost benefit could include recognizing employees for their service inside and outside of the office. Employers can support their employees’ outside interests, such as charity work, tutoring, marathon training, etc. Administrators can establish a link at work to what’s important to the individual employee by giving a sign of recognition

or a note of encouragement for their successful efforts outside the office.

Access to Firm Information

Another additional benefit could include giving staff “access to information.” Employees don’t want to be left in the dark; they want to know what is happening in the workplace, and they want to stay informed. Employees don’t want to hear from others outside their firm what just happened down the hall. Werner recommends delivering news, good or bad, as openly as possible.

Personal Resources

Also providing some common resources or contacts for your employees who may be struggling with child care, elder care, etc. is another low cost employee benefit. Providing a list of services or websites is an added employee benefit that shows the employer has a vested interest in the employee’s well being and life outside the work place.

Ongoing Communication

Werner suggests that an administrator who displays a rapid response to their peoples’ needs is another low cost employee benefit. DDI’s Employee Survey noted that 53% of employees said their workload had increased by 25% or more. Administrators can suggest to staff if they are feeling overwhelmed or struggling with their current work load to seek out the office administrator or their immediate supervisor for guidance or assistance in prioritizing their assignments. Keeping an open flow of communication will help employees feel at ease and more confident with their added responsibilities.

Challenging Your Employees

Assigning special roles or assignments to your staff might provide them opportunities to develop new skills and boost their morale. Werner suggested managers re-assign some work based upon their employees’ talents. Werner recommended administrators provide the online assessment test, Strengths Finder 2.0 by Tom Rath, to employees. This assessment takes 30 minutes and will identify the top five strengths out of 34 for individuals.

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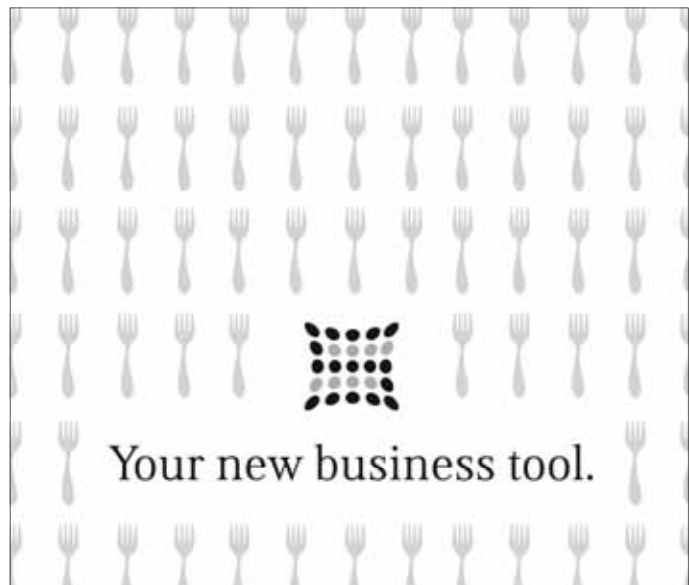
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Protecting Your Firm's Information and Reputation: A Compliance Toolkit Solution

By John Helm

A surprising number of law firms do not have a process in place to help protect them from an information breach, leaving them vulnerable to significant fines and costly litigation. In response to the growing concern and laws governing privacy, the National Association for Information Destruction (NAID) has developed an Information Destruction Policy Compliance Toolkit. The "Toolkit" is designed to help organizations develop the written information destruction procedures now required by law. According to the NAID, most organizations in the United States report that they currently do not comply with this requirement and, therefore, are at risk. The Toolkit is the first and only publication to specifically address information destruction policy development with a goal of making compliance with the laws easy and understandable.

The timing could not be better.

The Federal Trade Commission recently reached a settlement with an Illinois-based mortgage company for discarding personal information without first destroying it, resulting in a fine of \$50,000. In the settlement, the FTC cited the absence of the required written policies and procedures as a basis for the penalty. Similarly, the Attorney General of Texas recently announced two settlements with retailers for improper disposal of personal information, also citing the failure to have written policies and procedures. In each of the settlements, the resulting fines amounted to hundreds of thousands of dollars.

According to NAID's executive director Robert Johnson, "It is obvious that law enforcement agencies are becoming more aggressive in requiring compliance with the information destruction regulations as they continue to struggle with the growing ID Theft epidemic. Since last summer alone, there have been more fines, charges, and penalties for improper disposal of personal information than there have been in the prior ten years."

"For some organizations, the policy on information destruction amounts to a single sentence, advising employees to destroy sensitive information properly before it is discarded," Johnson adds. "In today's social and business climate, that simply does not provide sufficient direction to employees who are dealing with many forms of media from any number of sources. Regulators, auditors, courts of law, the media and public sentiment are insisting on a more thorough approach to information disposal because of the potentially devastating consequences of improper disposal on people's lives."

Prior to authorizing a NAID member representative to distribute the Toolkit, NAID requires that they become oriented in its use. Only individuals who have completed the orientation are permitted to distribute it.

The Toolkit contains sample policies and procedures for training, authorization, and destruction for the full range of conventional media forms, including paper records, computers, magnetic tapes, and optical and micro media. In addition, the Toolkit includes sample forms, templates, and other resources useful in implementing the policy. And, while the Toolkit offers information destruction procedures for in-house information destruction, it also contains sample policies and procedures for selecting competent service providers.

Alan Andolsen, a highly regarded records management consultant who contributed to the Toolkit, says, "To my knowledge, this is the most thorough examination of proper information destruction available to date. It is something that can be integrated into almost any existing information management or security program, or it can stand on its own."

The NAID Information Destruction Policy Compliance Toolkit, which runs over 70 pages and includes a CD, containing electronic versions of all templates and sample forms, is available free-of-charge from an authorized NAID Certified provider.

John Helm is a partner in Rentacrate Shred-X LLC, the leading supplier of sustainable moving product solutions and NAID AAA Certified provider of document and information destruction services and authorized Compliance Toolkit provider. John may be reached at 847-312-5077 or via email at jhelm@rentacrate.com.

Meet Me in St. Louis

They met me in St. Louis. Everyone from Chicago flew to St. Louis – **but not me**. No, I had to drive 5.5 hours in the rain. Fortunately, the traffic was light (just 18-wheelers and me). Have you been there? As you can imagine, I was feeling a little sorry for myself. I drove because I have family in St. Louis, and I was going to stay with them, instead of the beautiful, spacious rooms (so I heard) at The Chase Park Plaza Hotel.

I left early enough on Thursday to give myself plenty of time in case of traffic or an emergency. Therefore, I was a good hour or two early. Since I did not have a room to go to, I hit the bar. While I sat there watching the news with my diet soda (bet you didn't see that one coming), an out-of-town ALAer sat down next to me. She had just arrived from Ohio. She was famished. Her flight was supposed to get in a couple of hours prior. Unfortunately, the flight made a hellacious attempt at landing in the bad weather, then decided half way down to abort the landing and circle for awhile. (Yep, now I'm pretty happy I drove!)

After the exuberant keynote address, we headed up (what a beautiful view of the city, too) to the welcome reception for some food, drink, and good old dancing the night away. The theme of the conference was "Meet Me in St. Louis" with a trip back in time to the 1904 World's Fair. What a spread the hotel provided! Foods introduced or made popular at their World's Fair were served.

The reception is a time to meet up with all our own Chapter members and friends from afar, commiserate, and just hang out. How often are we able to get away from our office, our home, our family, our children, our spouses, and just let loose – to let our hair down and be with others who are in our same shoes, or, as some of us were on the dance floor, shoeless?

On Friday and Saturday, there was plenty of time in between our breakout sessions to visit all the business partners in the exhibit hall. The room was packed full. The exhibitors were more than eager to share their strategies to help us perform our jobs better and our firms run more efficiently. We connected with our current business associates and discovered new trends from new associate contacts, as well.

There was a wonderful reception in the Exhibit Hall on Friday. The exhibitors offered prizes, and the drawings were held during the reception. What a way to end a perfect day! Drinks, appetizers, and gifts! Did I mention the rain had stopped on Friday as well!

Friday night we were on our own to create our own St. Louis experience. There are so many fabulous restaurants and historical venues to choose from. The Gateway Chapter assisted many attendees at their hospitality booth by offering a visitors' guide and sign-up sheets for restaurants.

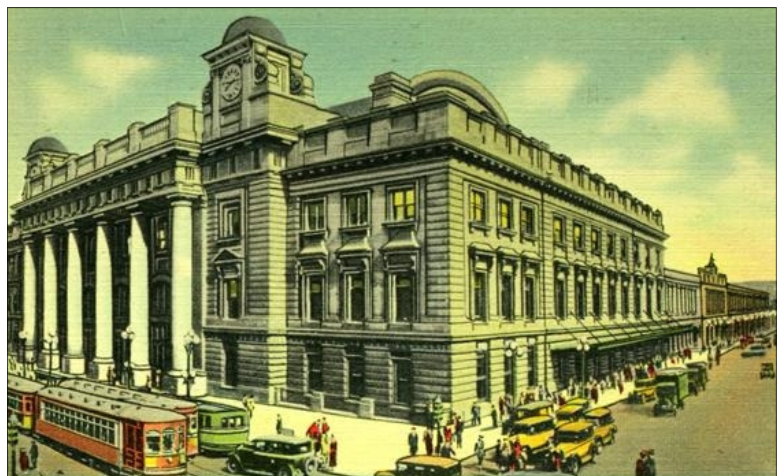
St. Louis is a lovely, historical city. It was built on a base of Spanish and French tones. Its Arch represents the Gateway of the westward movement in the United States. St. Louis hosted the 1904 World's Fair that introduced many foods, such as the hamburger, hot dog, cotton candy, and even iced tea! If you take a tour of this fine city, you don't want to miss the Anheuser Busch Brewery, Cathedral Basilica of Saint Louis, and the Fabulous Fox Theatre, to name a few.

The Regional 3 Management Team, led by Karen Griggs as director, teaming with the Gateway Chapter, really put on an A+ program. The conference truly was an inspiration and a much needed revitalization. We all need to get out of our offices, step away from our handheld devices, and receive some well-deserved mental rejuvenation. That is what the conference did for me.

By Lisa Van Sant

Office Manager

Schoenberg, Finkel, Newman & Rosenberg, LLC



Chicago's Northwestern Depot



St. Louie Woman

A little bit of personal history before I begin to write about the conference: My late mom, who normally enjoyed music, art, and visiting botanical gardens, would get an itch to play Bingo every year or so. She would call my sisters and me, and off we'd go. Those were the days when door prizes were toasters, mix masters, and coffee pots, and, once in a while, a \$100.00 prize.

Afterward, we would all march out the doors of the school hall. My mom would adjust her hat and say, "Well, gals, we never win, do we?" So it goes. That's a fond memory for my sisters and me, and I smile about it when I buy a \$1.00 lottery ticket. So, I was surprised and delighted to learn that I had won a scholarship to this year's annual ALA regional conference in St. Louis.

I'd describe the plane ride, but I'm trying to forget it. Suffice to say, there were many storms over central Illinois. I kept my head buried in a magazine and tried not to look out the window.

The Chase Park Plaza Hotel, in my estimation, was a great venue for the Conference. It is one of those old, grand, and solid hotels and was renovated a few years ago. The area where it is located is known as the "Central West End," a neighborhood that is undergoing gentrification, including trendy art galleries and lofts. Homes along the parkway opposite the hotel reminded me of the large Tudor houses along Sheridan Road in Evanston. Forest Park, which was the setting for the 1904 (Louisiana Purchase Exposition) World's Fair, is within a stone's throw of the Chase Park Plaza. A few St. Louis natives with whom I spoke said the hotel was very "old school." If the term "old school" refers to staff answering questions with "thank you" and "it's my pleasure," then I definitely like anything old school. Meeting rooms were more than adequate for our seminars. Better yet, since it rained – and rained hard – for most of the time the conference was in session, it was wonderful not to have to go out and catch a bus in the morning.

In case you've been in the South Pacific for the past month or so and haven't heard the news, the 2010 Region 3 Conference will be held in Chicago. Diane Brummel, our hardworking and engaging Chapter President, asked the Chicago attendees to work at the "Chicago Table" in the Registration Area in St. Louis. I did that on Thursday

afternoon for a few hours. The theme was "Sweet Home Chicago," and the table was loaded with all kinds of candy from Chicago-area candy manufacturers. There were Chicago pins and nifty raffle prizes. I've been a member of the ALA for nearly 20 years, and I am impressed time and time again by the hard work the Chicago ALA board and its members do for our wonderful organization. This table and what it took to put it all together were no exception. I felt good, too, catching up with friends from Chicago and chatting with other states' ALA members who stopped by our table.

Our St. Louis ALA hosts were warm and welcoming from beginning to end. Speaking of warm and welcoming, the St. Louis registration desk offered small pieces of a wonderful cake called "Goosey Butter Cake" – a St. Louis tradition. I believe it was served later at the buffet, too. (Is it lunchtime?)

Thursday evening programs included the "ALA Welcome," and awards were presented to members for their services to ALA (the conference coincided with Professional Legal Management Week).

Kevin Brown, the Keynote Speaker, spoke on "Personal Accountability and the Question Beyond the Question (QBQ)." I believe ALA keynote speakers are some of the best in their field. Even if my mind starts to roam while I'm listening, large parts of their speeches strike me deeply.

"Meet Me in St. Louie" was this year's Welcome Reception theme – more good food, great band (the lead singer is a legal administrator in North Carolina), and a fun time for business partners and members alike.

Friday began in earnest. An array of classes was there for the choosing. Of all those I attended, I only rated one as a "4" out of "5" on the Evaluation Sheet. The rest were pertinent to my work, and the speakers carried their messages well.

The Exhibitor Luncheon took place in the Exhibit Hall, and it was wonderful not to have to duck sales calls but to chat with the business partners, in person, about new products and services. It was also a great time to meet more ALA members, as the seating was open, and one was forced to introduce oneself and begin a conversation.

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One of my firm's business partners and exhibitors at the conference is Cash Management Solutions, whom I use for outside collection work. They are headquartered in St. Louis, and they invited me to dinner with them on Friday evening – more food! I had a wonderful time with them and members from St. Louis and Michigan firms. By the time we finished our meal, it had stopped raining, too! I walked back to the hotel and chatted with an ALA member from St. Louis, who explained to me the history of the neighborhood and about various St. Louis neighborhoods. (From what I gather, St. Louis has many neighborhoods; they just don't all run together, though, as they do in Chicago proper.)

I've enjoyed most of the National ALA Conferences I've attended. But, I have to say, there's something very nice and intimate about the Regional Conference. It may be because it is smaller in scope, or because the seminars I elected to attend were so *good*, or maybe it was just because I was in my element because I'm from the Midwest. I don't know. I do know I'll try to attend Regional whenever I'm able to again, and I'm writing to urge all of you who haven't attended a Regional Conference to do so. And, considering it's in our own back yard next year, you won't have to travel far.

Thank you, Greater Chicago, for providing me this St. Louis opportunity. I am sincerely grateful.

Oh, one last thing ... ALA Conference business partners always seem to be giving away great prizes, although I've never won one, that is, until I went to St. Louis. I won a WinScribe digital dictation license for an attorney and secretary and some other goodies that come with it. Coincidentally, moving to digital dictation is my next big project. The timing and win couldn't have been better. Thanks, Mom.

By Beth Winefield
Office Administrator
Aronberg Goldgehn



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I Met Them in St. Louis!

This year's Region 3 Conference in St. Louis afforded me the opportunity to attend the Region 3 Council Meeting as a representative of The Greater Chicago Chapter and to meet the Region 3 Management Team. They are a terrific group of ALA members – Karen Griggs (Director, from Kansas City), Fran Gentili (Communications, from Kansas City), Julie Hill (Education, from St. Louis), Cheryl Nelson (Projects, from Minneapolis), and Michel Farrah (At-Large Director, from Canada). The Team did an excellent job pulling together a great conference – from Kevin Brown, who spoke about personal accountability and the QBQ, to Cal LeMon, who shared with us the skills needed to lead, not manage chaos.

The purpose of the council meeting is to share information from ALA Headquarters with the leaders of the chapters in Region 3 (Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, West Virginia, and Wisconsin). Many of the chapters had representatives in attendance at this council meeting, so the ice breaker and round table discussions made it possible for us to meet and interact. We learned more about ALA's search for a replacement for John Michalik (who will retire this coming year) and the policy regarding the new logo. We were reminded to share information about the many ALA Benefits with all of our members. One only has to visit the ALA website to find all the things ALA offers us to make us better at what we do – annual and regional conferences, webinars, job bank, vendor search, ALA Currents; the list goes on and on. We were also informed that the ALA Code of Ethics had been re-written and would be published next year.

The most important thing (for me) at this meeting was the discussion about the 2010 Region 3 Conference to be held in Chicago at The Drake. Hosting this conference is a great honor for The Greater Chicago Chapter. I know from working with so many of you over the past few years that you will spare no effort in doing whatever it takes to make the 2010 Region 3 Conference the best one yet! Please mark your calendars (October 14, 15, and 16, 2010), and be sure to budget for your attendance at this event. I look forward to seeing all of you!

By Carol McCallum, CLM
Office Administrator
Lewis Overbeck & Furman LLP

P.S. For all of those wondering what the heck QBQ means ... It stands for the Question Behind the Question ... a practical tool for leaders at all levels to practice personal accountability by making better choices in the moment. The QBQ has three guidelines – it begins with “What” or “How,” contains an “I,” and focuses on “Action.” QBQ's don't begin with “Why” (victim thinking) or “When” (procrastination) or “Who” (blame).

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This exercise would be appropriate to provide at a monthly staff meeting or lunch and learn for staff. Werner suggested the assessment will re-energize the staff and map your peoples' strengths without placing a label on anyone.

Finally, as administrators, we all realize that employees want to be recognized for their good work, loyalty, and commitment to their firm. Monetary benefits are not always the solution. Employees value benefits that demonstrate a strong understanding of their well-being. A sure way to get your employees re-energized and engaged at work is to make them aware that you, the employer, are committed to their personal and professional growth and that you have provided the steps to help them achieve that success.

By Patsy A. Carey
Office Administrator
Stamos & Trucco LLP

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Region 3 Conference in St. Louis



Charity Casino Night

On Wednesday, October 28, 2009, the Greater Chicago Chapter of the Association of Legal Administrators held one of its most successful Community Challenge events, Charity Casino Night. The event was held at the Hotel Allegro on West Randolph Street in downtown Chicago from 5 pm to 9 pm.

There were poker tables, craps tables, blackjack tables, roulette tables, a money wheel, and slot machines that were used constantly from the time the event began until it ended. In addition, there was lively "Las Vegas" entertainment provided by Anthony "Frank" Cassano, which was enjoyed by all. A 50/50 split was held, along with numerous raffles of items donated by our generous business partners. "Butterfly" martinis were unlimited and flowed continuously, along with delicious hors d'oeuvres.

The net proceeds of this Community Challenge will go to benefit "Friends of Megan/The Robert H. Lurie Comprehensive Cancer Center of Northwestern University." Friends of Megan was founded to honor Megan Ann Gaffin, who lost her short battle to cervical cancer at the age of 25. Megan was diagnosed with cancer in December 2005 and bravely fought for eight months before the cancer overtook her. Although her life was short, she was a blessing to all and touched many hearts. To remember and honor Megan's life, Friends of Megan is dedicated to raising money to help fund research for a cancer cure. All proceeds are donated to the Robert H. Lurie Comprehensive Cancer Center of Northwestern University in Chicago. Megan received treatment from this facility, and it is one of only 41 recognized as a Cancer Center in the United States.

The goals of this Community Challenge were threefold: (1) to have the event completely underwritten by ALA business partners and law firm sponsors, (2) to have 100 people attend the event, and (3) to raise \$5,000 for the charity.

As a legal community, we should be very proud – we exceeded our goals tremendously. The event was totally underwritten by ALA business partners and law firm sponsors, and over 160 people attended. As a result, we were able to raise approximately \$10,000 for the charity.

Thank you to everyone for their support of this year's Community Challenge!

The Community Challenge Committee:

Cynthia LeGrand – Chair
Susan Gerovasil – Co-Chair
Lori Duff
DeAnn Hanson
Rand Kalik
Molly O'Gara
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Charity Casino Night







CHARITY CASINO NIGHT

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Silver Handcrafted Ladies Watch	Anonymous Donor	Sara St. Clair
Black Handcrafted Ladies Watch	Anonymous Donor	Kate Konieczny
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Friends of Megan Bottle of Wine and Wine Tote	Cinthia LeGrand ALA Greater Chicago Chapter Member	Jeremy Kruse
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**The Greater Chicago Chapter of ALA
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Worksite Wellness

What are you doing to promote your employees' mental and physical health? Forward-thinking law offices are pursuing workplace wellness initiatives to encourage positive behaviors that benefit individuals and their firms.

By Chris Mittelstaedt

Wellness can mean different things – on mental and physical levels – to different people. Leah Cox, Executive Director of the California Task Force on Youth and Workplace Wellness, believes that when looking at worksite wellness, the first place to start is with chronic disease prevention.

“Physical inactivity and preventable diseases can lead to chronic conditions such as obesity, heart disease, and diabetes that cost U.S. companies billions of dollars each year in lost productivity and medical expenses,” she said. “Since adults spend the majority of their waking time at work, offices are a natural place to encourage positive behavior changes such as exercise and healthy food choices.”

The concept of workplace wellness in corporate America dates to the 1950s, when large companies, such as Johnson & Johnson and PepsiCo, started what were then called “executive fitness programs. In the past, it was difficult to equate these programs with cost savings. Today, however, with rising health care and staffing costs, plus the unprecedented increase of chronic diseases related to behavior-based choices, the economic benefits of implementing worksite wellness programs are much more apparent. Companies realize that the healthier their employees are, the healthier their organizations will be. Many law firm clients of The FruitGuys are pioneers in reshaping what modern workplace wellness looks like.

Workplace wellness programs are gaining in popularity as employees look for new and innovative ways to stay healthy. Savvy legal administrators may consider wellness initiatives for their worksites, knowing that the healthier their employees are, the healthier their firms will be.

A Wake-Up Call

Miriam Ben-Natan, Director of Administration for the San Francisco office of Pillsbury Winthrop

Shaw Pittman LLP, and her colleague Kathie Pieri, who fills a similar role at the firm's Silicon Valley office, vividly recall attending a human resources and administrators meeting in Houston, where a human capital consultant discussed how to create healthier environments at worksites. During the trip home, as they talked about what they could do for the 515 employees at their two offices, Pieri flipped through a magazine.

“She started counting ads for drugs that helped people manage diseases like acid reflux, heart disease, blood pressure, and others,” Ben-Natan said. “We got up to eight or nine advertisements – all for things that are, in some cases, considered preventable. We realized that we needed to think about expanding our worksite wellness program to help our employees avoid lives that might require these kinds of drugs.”

Earlier this year, Ben-Natan organized an extensive expansion of the wellness program for Pillsbury's Northern California offices. The program focused on getting as many employees as possible to participate in healthier behaviors. A reward-based point system and team-building wellness exercises were used to allow access to healthier food, informational workshops, and physical activity choices.

“We put water in the vending machines, distributed granola bars, ordered FruitGuys fruit, and began putting out veggies every week,” said Ben-Natan. “We have developed and are promoting healthier evening meals for those who need to work late, and we have formed a partnership with a multi-location fitness center.”

The point system awarded employees credits for achievement in everything from increased physical activity to better nutrition. “The key was focusing on either starting to be physically active and eating well or taking good habits to the next level,” said Ben-Natan. “We call the program ‘continuing life care commitment.’ “Teams that earned 50 points or more received special gifts; everyone who participated received a Jamba Juice gift card. The team with the most points from each office received spa gift certificates for each team member.

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With rising health care and staffing costs, plus the unprecedented increase of chronic diseases related to behavior-based choices, the economic benefits of implementing worksite wellness programs are much more apparent Many law firm clients of The FruitGuys are pioneers in reshaping what modern workplace wellness looks like.

Getting Started

So, do you have to have a gym in order to have a wellness program? No, and companies shouldn't perceive starting a wellness program as a daunting process.

"Worksite wellness can seem overwhelming for organizations at first," said Christina Carpenter, Senior Health Program Planner for the San Francisco Department of Public Health. "We think it is easier to start and manage a wellness program if you break it down into definable categories."

Carpenter takes part in Mayor Gavin Newsom's Shape Up San Francisco initiative, a citywide program aimed at helping residents and workers become more physically active and healthier. For worksites, the initiative looks mainly at three areas: increasing physical activity, motivating people for better nutrition, and smoking cessation. With these goals in mind, Shape Up San Francisco's wellness program then helps companies understand how to move forward with a plan. The program calls for:

- getting top management to support the wellness program;
- creating awareness and educating employees about what unhealthy and healthy habits are; and
- offering work-related opportunities for employees to switch from unhealthy to healthy habits through access to programs related to physical activity, nutrition, and smoking cessation.

Carpenter agrees with Ben-Natan that assessing a company's organizational structure is the key to understanding how best to implement a wellness program.

"You need accountability and consistency, and that generally starts with some kind of top-level approval. Selling managers and 'C-level' executives on why worksite wellness programs are

important is a key phase," said Carpenter. "Then finding a champion to lead the initiative is also very important. It should really be a no-brainer for organizations – we know this stuff inherently. 'You are what you eat, an apple a day keeps the doctor a way, walking keeps you fit.' It's all there, but we need to find a way to implement it at offices."

Chris Mittelstaedt is the Founder and Chief Executive Officer of The FruitGuys (www.fruitguys.com), a company that delivers fresh fruit weekly to offices nationwide as a worksite wellness benefit. Contact him at chris@fruitguys.com.



Finance Brown Bag

On Monday, August 24, 2009, a Finance Brown Bag was held at the offices of Marshall, Gerstein & Borun LLP. Our speaker was Mr. Seelin Naidoo, and the topic was “Keep the Cash Coming In - Collections in Law Firms.” Seelin is the CEO of Cash Management Solutions (CMS), a firm that specializes in collecting accounts receivable (AR) and providing other financial services to law firms and similar businesses. About 35 attendees listened as Seelin discussed the impact the current economic downturn is having on law firms of all sizes.

Seelin asked “What is ‘normal’ now?” He noted more law firms have failed in the past 18 months than ever before. Financing is three times as expensive as before the downturn, if your firm can obtain it. More clients are asking for fixed fee arrangements and substantial discounts. Seelin then asked “How is your firm responding?”

There are four ways firms are weathering this storm:

1. reducing costs;
2. increasing revenues;
3. increasing profitability of their existing revenue base;
4. a combination of all three.

We’ve heard a lot about option one, especially reduced headcount, but option three warrants much attention.

By collecting more of your receivables faster and with a higher realization percent, you are increasing profits without bringing in new clients. The longer it takes to collect on an invoice, the more likely it is to be written down or written off, which lowers realization. Based on Seelin’s work with 120 law firms, if an invoice is collected within 30 days, about 94% is realized (value collected divided by value worked). If collected at 180 days, only 55% is realized. After 365 days, only 10% on average is realized.

Every time entry has a life cycle. It is worked, then billed, then ultimately collected. Prior to the downturn, the average length of this life cycle was about 68 days. Average days to collect are now

over 75 days, an increase of about eight days, or 12%. To put numbers behind this, say your firm bills annual fees of \$30 million. That means each day your “sales” (fees) are about \$82,000. If it previously took you 68 days to collect your unbilled time and AR, that means you needed capital, and/or bank debt, of around \$5.6 million (equals 68 days times \$82,000 per day) to support your operations and pay your partners. If that cycle goes up eight days, you now have to fund an extra \$656,000 (eight additional days times \$82,000). This amount has to come from somewhere – perhaps more debt, cutting costs or headcount, or reduced partner distributions.

To keep your collection cycle from increasing, there are several steps you can take:

- Make your first collection contact (call or email) after 30 days. The longer you wait, the less you will collect. Seelin mentioned that firms don’t lose clients over collection efforts handled in a professional manner. Also, the collection rate for invoices issued by commercial businesses (our clients) is 39 days. Why do we permit our clients to take twice as long to pay us as they accept being paid themselves?
- Determine at what point collections are taken out of the attorneys’ hands. Seelin suggests giving attorneys one month to try to collect, then automatically moving the process to collections staff. Management must support that process.
- Attorneys should not mail invoices. Attorneys tend to hold the invoices for awhile, which adds more days to your collection cycle.
- Collections staff should routinely be present at firm credit/collections meetings with partners.
- Ask your front line collections staff what they would like changed to make collections work easier. They probably have good suggestions.
- Obtain retainers that equal at least 2.5 month’s worth of expected billing. This practice allows time to have the client replenish the retainer before it is completely used up. Better yet, hold off applying the retainer until completion of the work.

(continued on page 31)



(continued from page 30)

Seelin also provided an interesting Power-Point presentation with statistics on law firm collections. The presentation has been posted on the ALA-Greater Chicago website. Seelin Naidoo can be reached at 314-432-6688 if you have questions regarding his presentation or services.

Finally, Chapter member John Podbielski, from Ungaretti & Harris, is assembling a collections-oriented informal email distribution group. Participants could pose collection questions to the group. If you are interested, John can be contacted at: jtpodbielski@uhlaw.com.

By Barbara Javorcic, CPA
 Director of Finance
 Marshall, Gerstein & Borun LLP



ALAMeansBusiness

News and Information for the Legal Vendor Community

Attention All Business Partners: Have you signed up for your complimentary subscription?

In response to business partners' expressed interest in learning more about ALA, its members, and opportunities to connect with ALA decision-makers, the Business partner Relations Committee and Business partner Advisory Panel created *ALA Means Business: News and Information for the Legal Business partner Community*. This quarterly electronic newsletter contains general information about ALA conferences and publications, as well as specific information the legal business partner community needs for planning and budgeting purposes. A "Quarterly Question" segment features a question relevant to the legal business partner community and three answers to it: from an ALA member, an ALA business partner, and an ALA staff member. We hope this approach will help readers gain a larger appreciation for topics and issues facing the business partner community and help us work together toward mutually beneficial outcomes. Although the newsletter was designed specifically for the legal business partner community, chapter leaders with an interest in business partner relations may also request a complimentary subscription.

Get your complimentary subscription to ALA Means Business - News and Information for the Legal Business partner Community today!

Go to: <http://www.alanet.org/resourceforbusinesspartners/businesspartnernewsletter.asp>

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On April 1, 2009, I was elected to the board as the Membership Director. I had no idea what the Membership Director's role was, except to maintain the records of all our current members and recruit new members. When I took over the membership role, we had 304 members. Since that date, I am proud to say we have grown to 314 members and counting. Maintaining our numbers from last year and increasing our membership in this economy is an amazing achievement. As the Membership Director, it is my job to notify potential members of the benefits we offer when they join our local Chapter.

On Wednesday, October 21, 2009, I hosted a social event for new members who had joined our Chapter after April 1, 2009. I also invited the ALA members who had joined the international chapter but had not yet joined our local Chapter. We had eight new members attend, plus seven board members and one committee member. The board members in attendance were Bob Karnia, Survey Director, Mary Ann Rojas, CLM advisor, Deb O'Donnell, Website Director, Cinthia LeGrand, Community Challenge Advisor, Diane Brummel, President, Carol McCallum, President-Elect, and Sally Mendoza, a membership committee member and long-standing member on the board.

We welcomed the following new members to our Chapter at our new member social: Barbara Kimble, Renee Whitehouse, Sue Burdett, Karen Hammersmith, John Podbielski, Kate Wilson (who also serves on my membership committee), and Katherine Yoder. I am pleased to announce that the event was a success.

(continued on page 34)

(continued from page 33)

Marie Fiorito



I had several goals in mind when I set up this event: to expose our potential or new members to our board members

and what they do for our Chapter and to let them hear and see their passion for what they believe in as an ALA member. Additionally, we wanted to establish a sense of belonging for our new members. There is a time commitment needed when one serves on the board or a committee. I wanted our newest members to hear it straight from our board members.

I had each board member speak of their role on the board and how their roles benefit our members. Diane Brummel spoke of her experience as our current president and what led her to her role. The meeting ended with Carol McCallum, President-Elect, speaking of what she sees as our future. As each of the board members spoke about their roles, the interest in each of the new members' faces was apparent. They were intrigued and had questions. The new members spoke about what their roles at their firms were and how long they had been in legal field. Several of the new members were new to the Administrator role, and a few inherited the role due to downsizing. One came from a totally different field, so the law firm environment is a new experience for her. It does not matter where one comes from but that we are here together.

ALA has proven its ability to develop relationships. One can never be thankful enough for all the wonderful friendships made along the way. ALA has provided individual and career growth one can experience by being on the board and/or becoming involved in our Chapter.

By Marie Fiorito
Office Administrator
Loeb & Loeb LLP



New Member Social guests

Member News

Our own Walter Roth, of Meckler Bulger Tilson Marick & Pearson, served as a panelist for the seminar, "Attorneys in Transition: Starting a New Law Firm." The seminar was held on November 16, 2009, at The John Marshall Law School.

I continue to encourage our members to share their "other lives" with all who read our newsletter. One of the greatest personal benefits of my long-time membership is the wonderful friends I have made and continue to enjoy. Five busy administrators and one happily retired one enjoyed a weekend in Michigan just as autumn began. (Thank you, Lou Schiller!)



Barb Staczak, Anne Jewell, Sally Mendoza, Lou Schiller, Kathy Terborg, and Vivian Schroeder enjoy a weekend in southwestern Michigan



Member Profile

Barbara Kimble is the Chief Operating Officer of Pierce and Associates. The firm has 35 attorneys and is located at 1 North Dearborn in Chicago. The firm's practice is foreclosure and bankruptcy. Barbara has been working in the legal field for eight months. She has an MBA from DePaul University in Chicago. Before becoming an administrator, Barbara worked at AT&T for 30 years and was Director of Consumer Call Center Operations.



I entered the field of legal administration because I retired from AT&T and wanted a smaller job. My sister, Jill Rein, a partner at Pierce and Associates, solicited me for the new operations position they were creating. I foolishly thought it would be a smaller job, and I readily accepted

the position. Now, eight months later, I understand just how hard it is to be a Legal Administrator! I love it!

I joined ALA because of the education and networking opportunities. I attended the conference in New Orleans to see what ALA was all about. I received so much from the classes and met such great contacts that I came home and joined ALA.

To be successful in legal administration you must focus on continuous improvement at every level – people, process, systems, and performance.

The thing I like best about being a legal administrator is the fast pace of the industry. Foreclosure laws change rapidly, and the operations team needs to be nimble and ready to change processes quickly with very little lead-time.

One of the challenges of being in legal admini-

stration is disputing issues and resolutions with Managing Partners and ensuring that policies are adhered to consistently.

The best advice I received is start with yes and work out the details later.

The best advice I would give to someone just entering the legal management field is that leadership and management skills are transferable. The law firm hired you because they needed someone to run operations. The partners and the attorneys know law, not business administration. They look to you as the expert in your field.

I motivate my staff by listening, assuming value in what they say, and taking their advice. They know the job better than I.

I recommend membership in ALA to others because you meet great people! I have only been a member for several months and already have contacted several members to compare what they do in their firms to how we do it. It is an easy way to find “best practice.” Also, we have already hired two vendors I met at the regional conference. ALA benefits my firm.

Three things that I do well are utilize my employees to their full potential, identify and resolve process gaps, and create performance measures for employees.

The last good book I read was *Memorial Day* by Vince Flynn. It is non-fiction political intrigue and espionage.

The last vacation I took was to St. Thomas with friends.

The last good movie I saw was “Julie and Juliet.”

The one appointment I never miss is wine tasting!

In my free time I love to cook and entertain.

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Business Partner Profile



Sheldon Mallory

My name is Sheldon Mallory.

I work for Coffee Unlimited (The Best in America).

The company's product or service is Office Coffee and Vending Services.

The company has 50 of the most qualified individuals in the OCS Industry.

My Title is Senior Sales Manager.

Before becoming a vendor to the legal market, I was a professional baseball player (Kansas City Royals, Oakland A's, Toronto Blue Jays).

I have been working the legal market in the office coffee industry for 26 years.

I have a degree in: *Go Red Birds!*

I support ALA because great service is needed, and Coffee Unlimited provides it.

The thing I like best about being a vendor to the legal market is: the relationships that have been made through the years.

The best advice I have received is: Don't look back. Something might be gaining on you.
(*Leroy Satchel Page*)

The best advice I would give to someone just entering the legal market is: Fall down seven times; get up eight.

I try to motivate myself and/or my staff by always having a positive attitude.

Three things I do well are sell, sell, and sell. (Oh, that's one thing.)

While I love my current job, my dream job would be: I lived my dream as a professional in Major

League Baseball.

The last good book I read was *The Power of Positive Thinking*.

The last good movie I saw was: any movie starring Denzel Washington.

The last vacation I took was to Hawaii—great scenery (long flight).

In my free time, I am an avid bowler. I also enjoy listening to my daughter's new CD entitled, *Echoes (In My Head)*. I encourage you to look at her MySpace page at:
www.myspace.com/morganmallorymusic.

She will be opening for John Legend on December 26, 2009, at the UIC Pavilion.

I'm just a proud father!



August Board Meeting Highlights

Items Requiring a Vote of the Board

President-Elect-Elect: A motion was presented: Greater Chicago Chapter add the position of President-Elect-Elect, starting with the 2010-2011 Board, position to be held simultaneously with another board position, with one year of prior service on the board required. Motion was tabled for a vote via email.

Two Year Board Positions: Discussion was tabled until the September meeting.

Items for Discussion

Chicago Conference: Business partner tables are full, with 68 registered; 92 attendees are registered. An attendee list is being provided to vendors. AV needs, handouts, and scheduling are being finalized.

Membership: Marie Fiorito reported the committee is working on following up with national ALA members who are not members of the Greater Chicago Chapter.

Chapter Logo and Branding: Carol McCallum provided sample logos for discussion. They will be presented to ALA headquarters for their input. A vote on the logo was tabled until the September meeting. We need to incorporate ALA branding on all flyers and envelopes. Return envelopes should go to P.O. Box, not individuals at firm addresses.

New Business

A drawing for a scholarship to the Chicago Conference was held; Maureen Dohe, Susan Leis, and Lisa Van Sant were winners. A drawing for a scholarship to the 2009 Regional Conference in St. Louis was held; Lisa Van Sant, Patsy Carey, and Beth Winefield were winners.

2010 Regional Conference will be held in Chicago at the Drake Hotel. We will have a Chicago table at the upcoming Regional Conference.

Calendar of Events: The calendar was presented; board members should check to make sure responsibilities have been completed.

The President's Award of Excellence Guidelines were distributed.

Reports

Professional Development: Financial Brown Bag, "Keep the Cash Coming In," was presented by CMS on August 24, 2009, with 36 attendees. An informal collections-related listserv is being started. The speaker's PowerPoint presentation will soon be on the website.

Membership: Committee members are Sally Mendoza, Kate Wilson, and Colette Swiatkowski. We are working on recruiting members; we received a free 1/8 page ad in Law Bulletin. We are preparing a letter to Managing Partners and Firm Administrators at non-member firms with membership brochures. We currently have 310 members.

Small Firm: Meeting was held on August 12, 2009, hosted by Laura Marlin, with 14 attendees. Discussion included paperless office, services provided by insurance brokers, 401(k) plan brokers, and client gifts.

Mid-size Firm: Meeting was held on August 20, 2009, hosted by Sherry Gini, with 12 attendees. Discussion included "paper light" offices, disaster recovery plans/contacting employees, and file storage/retention.

Website/Communications: A new page was added to the Resources section: Chapter Alliances, which lists other organizations with whom our Chapter has a relationship and which may present networking opportunities.

CLM: The study group continues to meet with review sessions planned. A full, comprehensive test is planned for September, prior to the exam.

As an added incentive to encourage writing, the Greater Chicago Chapter is awarding free bi-monthly lunch tickets to any member (non-scholarship, non-board) who contributes articles to the newsletter during 2009.

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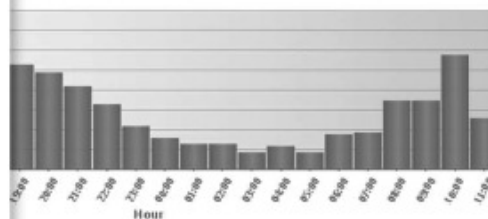
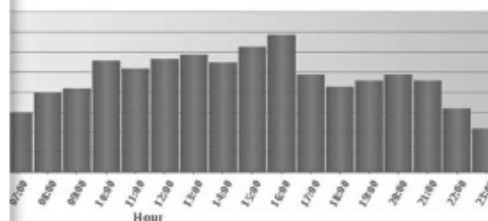
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USER ORG: Indersol Gruman Law Firm PAGEVIEWS: 8
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USER IP: 64.98.194.160 FIRST VISIT: 7/14/09

Frank Chaluda of Indersol Gruman Law Firm visited your site 3 times in the past 2 weeks. His last visit originated from a search for "Employment Lawyer" on Google.com. It lasted 9 minutes, spanned 8 pages and resulted in 1 interaction.

08/07/09 - Frank Chaluda shared a page named Employment Law Practice Area with Ron Balbo (ronaldb@iglaw.com) with the following message: "ron, these guys seems to have a lot of lawyers that could help us on the FEKA case. Should I engage the managing partner?"

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Fri Aug 07 9:39:31 AM	09s	About Our Firm
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Fri Aug 07 9:38:54 AM	30s	Practice Areas
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September Board Meeting Highlights

President-Elect-Elect: The motion presented in August was approved unanimously: Greater Chicago Chapter adds the position of President-Elect-Elect, starting with the 2010-2011 Board, position to be held simultaneously with another board position, with one year of prior service on the board required.

Two Year Board Positions: Discussion continued on changing job descriptions of certain positions (membership, website, vendor relations) to two-year positions. Further discussion was tabled until the October meeting.

Chapter Logo: Examples were circulated prior to the meeting. A motion to have version "A" as new logo was made, seconded, and approved. Carol McCallum will obtain a .jpg from ALA National to distribute to Board members.

Items for Discussion

Community Challenge: Cinthia LeGrand advised that invitations have been sent for the October 28, 2009, event at Hotel Allegro from 5:00 to 9:00 p.m. The event is also on the charity's website. Invitations also were sent to related professional organizations: IPA, ILTA, LMA, CALL, and IFMA. PMLW week starts October 5, 2009. Greater Chicago Chapter will go in with the above-named organizations to place a full-page ad in the *Chicago Daily Law Bulletin*. Cost to each organization will be \$142.00. A motion to approve expenditure of \$142.00 for the ad in *Chicago Daily Law Bulletin* was made, seconded, and approved.

Recap of Chicago Conference: Jena Neisler reported that everything went well, with good feedback from vendors and good feedback about the venue. Final budget figures are not yet available. Vendor survey responses are not yet available. Bob Karnia summarized the attendee survey results. A written summary of those results is forthcoming.

New Business

Membership Renewals for 2010: Marie Fiorito asked for opinions regarding increasing dues in 2010. October is the cutoff for any changes.

Holiday Party: Jena Neisler advised that Next Day Toner will be the sponsor, and the location will probably be MidTown Grill.

Regional Conference: Diane Brummel advised that around 15 members of the Chapter will be attending the upcoming conference. The Greater Chicago Chapter will have a booth with Chicago candy, pins, and postcards to promote 2010 Regional Conference in Chicago. Cost to the Chapter will be around \$200. Pitney-Bowes provided a sign; members will staff the table. There will be a Friday night get-together for attendees.

Reports

Professional Development: The educational sessions at the Business Partner Show received favorable reviews. Tentative topics for Brown Bags through April 2010 are in place.

Membership: An ad was placed in the *Law Bulletin* for three weeks. The Committee is working on a social event for new members who have joined since April 1, 2009 – to be held October 21, 2009.

Small Firm: The September 9, 2009, meeting was hosted by Colette Swiatkowski of McDonald, Hopkins, LLC, with 11 members attending. It was sponsored by GRM Information Management Services. Discussion included: records storage, health insurance coverage, timekeeping software for payroll, accounting controls, and employee incentive programs.

Mid-size Firm: The September 17, 2009, meeting was hosted by Duane, Morris, LLP, with 14 attendees. Discussion included: bonus and annual review structures for staff, wellness programs (implementation and benefits), reward/incentive programs, and transit programs.

Large Firm: The August 25, 2009, meeting was hosted by Neal, Gerber & Eisenberg LLP. Topics included videoconferencing, conference room scheduling software, and H1N1. The September 23, 2009, meeting was hosted by Wildman, Harrold, Allen & Dixon, LLP. Topics included a recap of the recent LFA retreat, matter budgeting software, excise tax on partnerships, controlling health care costs, and alternative models for secretary/attorney work groups.

(continued on page 40)

(continued from page 39)

Surveys: There were 56 responses to the survey for the Chicago Conference. Overall, the responses were very favorable. Survey participants valued the networking and educational sessions the most. The hotel also received a favorable rating. The price for the conference was considered reasonable.

CLM: The CLM group is in final review stage and meeting at least twice a week. Several ALA members have generously donated their time to assist them. Materials to start a study group for the May 2010 exam will go out in late October.

BPSRC's next meeting is October 1, 2009. The survey for Business Partners is done. The committee already has some great ideas for improvement. Changes will be proposed at the October board meeting, with the goal of sending letters out to Business Partners in November.

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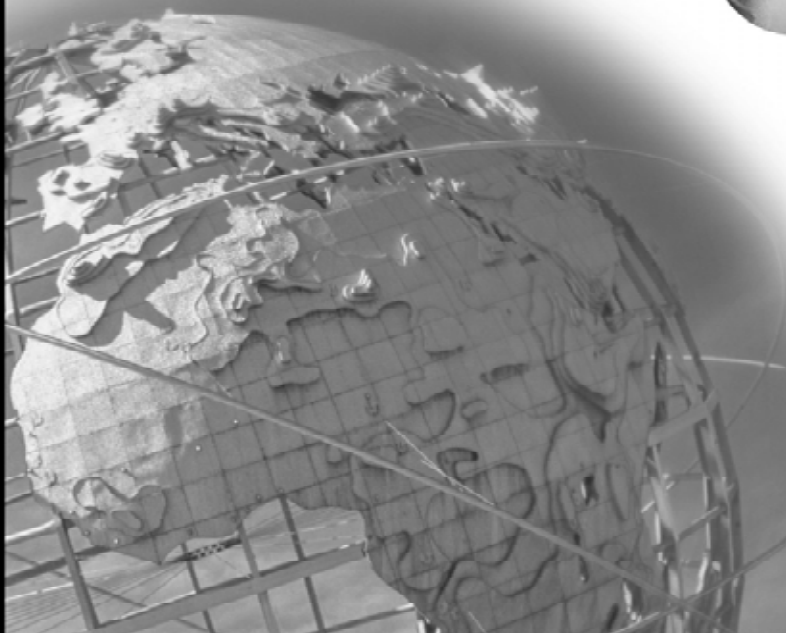
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CALENDAR OF EVENTS

Local Events

January:

15-16: ALA-Board of Directors Meeting
The Ivey Hotel, San Diego, CA
Contact: Nicole Larson,
ALA Headquarters

15-17: ALA – 2010 Annual Conference
Planning Meeting
Orlando World Center Marriott,
Orlando, FL
Contact: Kathleen Rossell,
ALA Headquarters

21: Mid-Size Subgroup Luncheon Meeting
SmithAmundsen

26: Board Meeting
Loeb & Loeb

February:

5-6: ALA-Regional Team Orientation
Hyatt Deerfield, Deerfield, IL
Contact: Nicole Larson,
ALA Headquarters

18-20: ALA Law Firm Financial
Management Conference
Carefree Resort & Villas, Carefree, AZ

18: Mid-Size Subgroup Meeting
Leydig, Voit, Mayer

23: Board Meeting
Kirkland & Ellis LLP

National Events

For further information about **local events**, visit: www.ALACHicago.org

For further information about **national events**, visit: www.ALANet.org



LaSalle Street, looking south