Orange County
A Chapter of the Association of Legal Administrators

OC-ALA's Waves

Winter 2018

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In This Issue...

President's Message

Terry Vickrey, CLM
OC-ALA Chapter President 2017-2018

Welcome to OC-ALA's 2018 Winter Edition of *Waves*! Please click below to connect to our President's Message video.

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Nominations for the 2018-2019 Orange County ALA Board of Directors

By Jessica Daugherty, Nominating Committee Chair

The nominating process for OC-ALA's next Board of Directors is underway.

According to Articles VIII and IX of the Chapter's Bylaws, a Nominating Committee consisting of the Immediate Past President, and four non-board members appointed by the Executive Board is assembled for the purpose of selecting a slate of Officers and Directors to be recommended to the membership of the Chapter.

This year's nominating committee members are Peggy Alexander, Rachel Alm, Toni Burnside, Hilary Martin and me. The proposed slate for OC-ALA's 2018-2019 Board of Directors is:

President:	**Jennifer Bodenhoefer**
President Elect:	**Michael Shuff**
Vice President:	**Donna Bustos**
Treasurer:	**Ann Thompson, CLM**
Treasurer Elect:	**Karen Kubani**
Secretary:	**Sylvia Rosas**
Director of Membership:	**Christine Wilbur**
Director at Large:	**Wendy Rice Isaacs, CLM**
Past President:	**Terry Vickrey, CLM**

The Nominating Committee is in the process of performing due diligence on candidates and will present its final report at the Annual Members' Dinner on March 29, 2018. As there may be a single slate, a vive-voce vote will be held at the March 29, 2018 meeting during the Annual Members' Dinner. The new Executive Board will take office on April 1, 2018, as provided in the Chapter's Bylaws.

Jessica Daugherty
Immediate Past President

2018-2019 OC-ALA Nominated Officer Biographies

Proposed Board Position: *President*

Nominee: *Jennifer Bodenhoefer*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD:

2017-2018 President-Elect
2016-2017 Vice President
2015-2016 Treasurer
2014-2015 Treasurer-Elect
2013-2014 Treasurer-Elect

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

2012-2013 Speakers
2011-2012 Networking & Hospitality

1) What contribution(s) do you feel that you can make to the Chapter?

I am organized, thoughtful, and devoted to the success of this organization. I believe that I can successfully assemble and lead the team it will take to provide the full scope of services that we wish to offer to our members.

2) What would you want the Chapter members to know about you on a personal level?

I am a life-long volunteer with a firm belief that I have an obligation to contribute to the world around me. In particular, supporting OC·ALA by board service is the best way I can repay the members for all the lessons, advice and support that I have received over the years.

♦ ♦ ♦ ♦ ♦

Proposed Board Position: *President Elect*

Nominee: *Michael Shuff*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD:

2017-2018 Vice President

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

2016-2017 Business Partner Committee

2014-2016 Finance and Technology

1) What contribution(s) do you feel that you can make to the Chapter?

I will be able to offer a different perspective on how the chapter is operated due to the fact that

I am from a different generation than most of the other board members. As the legal field changes, the OC-ALA will also need to stay up with the times. It would be in the chapter's best interest to look ahead and try to become a leader in some of the driving changes, rather than being reactionary. Having a better understanding of the new generation of attorneys and legal staff that will soon be the majority in some law firms, allows for me to better see the big picture of what will draw people into the Chapter in the future.

2) What would you want the Chapter members to know about you on a personal level?

I come from a family of four and I have just one older sister. We are a very tight-knit bunch and still find time to all get together as often as possible. My sister is married and expecting her first baby in March and we are all very excited.

My favorite pastimes outside of the office are anything that involves sports or the outdoors. I grew up playing all different kinds of sports and have a great appreciation for the outdoors. Being active and enjoying the beautiful California weather is how I prefer to spend my free time. On any given weekend you could find me four-wheelin' through the mountains or playing beach volleyball with a group of friends and family. I love to cook BBQ, work on my Jeep Wranglers, and often have a random small project that I am building.

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Proposed Board Position: *Vice-President*

Nominee: *Donna Bustos*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD:

Treasurer-Elect: 1 year

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

ACES: 3 years

CLM: 1 year

1) What contribution(s) do you feel that you can make to the Chapter?

As a team member and individually, I can support the President the Chapter with my optimism, and ability to think outside the box for solutions or ideas.

Whenever I can, I encourage (silent) members to be more active and to give a little more, when doing so they see that they get more. I'm a big advocate of everyone working towards points! Doing so, there's more attendance, and the potential for a member to win a scholarship.

2) What would you want the Chapter members to know about you on a personal level?

I believe in the Chapter and have realized it's importance to me and would want to provide the same opportunity for others, especially new members. We are not here to compete but to support each other

towards success. It's my belief that we can do it and with time and patience, we can be stronger together.

♦ ♦ ♦ ♦ ♦

Proposed Board Position: *Treasurer*

Nominee: *Ann Thompson, CLM*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD: n/a

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

Extended Board - CLM Study Group, 2013 to 2017

1) What contribution(s) do you feel that you can make to the Chapter?

I possess organizational skill that will assist in maintaining Chapter financial records. Also, as computers arc my friends, I look to automate and simplify processes using technology whenever possible. Support of the Executive Board and Chapter initiatives is important, as is working with the team to get things done. I will work hard to ensure the success of Chapter initiatives and events.

2) What would you want the Chapter members to know about you on a personal level?

I have been working in the legal industry for over 25 years. I have worked in varied positions from legal secretary and bookkeeper to Office Manager, Accounting Manager/Controller, and Director of Electronic Information Systems at small, midsize and large firms. In additional to ALA, I am a member of SHRM, APA, ABA and the IMA (Institute of Management Accountants).

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Proposed Board Position: *Treasurer-Elect*

Nominee: *Karen Kubani*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD: N/A

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

Large Firm - unsure of the years
Human Resources - unsure of the years
Legal Secretary Course - 2017

1) What contribution(s) do you feel that you can make to the Chapter?

I will bring a renewed enthusiasm and positive outlook to the Chapter by being a member of the Executive Board. Having left Gibson Dunn for a period and not being too involved for the past couple of years I am excited about the opportunity to serve on the Executive Board and become more involved in the Chapter at that level.

What would you want the Chapter members to know about you on a personal level?

I am thrilled to return to Gibson Dunn Orange County as the Director of Administration. I worked for Sharon Owen (the former Gibson Director of Administration for 6 years from 2008-2014) before transferring to Gibson's Los Angele office in a different capacity. I supported the firm's Associate Compensation Committee which oversaw the performance review process of all non-partners firm wide. It was a tremendous amount of work and a very rewarding position. I learned a lot about the firm in this capacity and formed many lasting relationships with folks in different areas of the firm.

I left Gibson for two years to pursue a role as Manager of Legal Administrative Assistants for Atkinson, Andelson, Loya, Ruud & Romo in Cerritos, CA. I chose to accept the position because it meant I could step into a manager role and the firm's main office in Cerritos was close to my home in Long Beach, CA. After two years with AALRR, I learned Sharon Owen was retiring from Gibson Dunn and chose to "throw my hat into the ring" and vie for the position. I feel fortunate to have been selected for the position and am very happy to be back with Gibson. I am honored to be asked to be a part of the Executive Board of OC-ALA and look forward to serving the Chapter.

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Proposed Board Position: *Secretary*

Nominee: *Sylvia A. Rosas*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD: N/A

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

Currently serving on the ACES and Small Firm Committees for 2017

1) What contribution(s) do you feel that you can make to the Chapter?

I feel that I can bring a different outlook and need to the Chapter. Both as a new Member and as someone that is training to become a new Administrator. I will have a different need from the Chapter. As more Administrators retire, there will be even more new Members and new Administrators like myself. I feel that I can bring in new ideas with regards to the needs of new people, new training or classes or new groups that could possibly be formed.

I am a hard working and can be available to assist the Chapter in any way. My dedication and work ethic will be a way for me to be a valuable contributor.

2) What would you want the Chapter members to know about you on a personal level?

I would want the Chapter Members to know that I am in the process of training to become the Administrator at my Firm when my predecessor retires. I am open to any advise and any constructive criticism that is offered. Any tips on juggling it all, work, family, etc., would be great.

I am really interested in learning as much as possible right now, just a big sponge, trying to soak it all up. I love getting to know people and having fun! My past times are eating, spending time with my husband and son and traveling. Combining all three is ideal, especially if I can squeeze a nap in there too! :)

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Proposed Board Position: *Director of Membership*

Nominee: *Christine Wilbur*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD: 2017-2018 Secretary

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

2016 - 2017 Social Media Committee

1) What contribution(s) do you feel that you can make to the Chapter?

As Director of Membership, it is my goal to creatively encourage new members who will bring diverse perspectives and will challenge the ways in which the Chapter functions. In my experience as Board/Extended Board Member, I have heard what Members like and don't like about the Chapter. This will greatly benefit prospective Members because I will identify with their necessities and can assist with navigating through communication channels to get them the resources they need.

2) What would you want the Chapter members to know about you on a personal level?

I hope to have a small farm one day with mini horses, cows and chickens. We are zoned to have these animals and my husband will be really happy when he comes home one day to our little zoo.

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Proposed Board Position: *Director At Large*

Nominee: *Wendy Rice-Isaacs, CLM*

PREVIOUS OFFICER POSITION(S) AND YEAR(S) HELD:

2008-2009 ALA President
1999 - 2003 ALA Region 3 Director
2007 ALA Annual Education Conference Chair
ALA Foundation Trustee: 2007 - 2008; 2017 - Present
Cleveland ALA Chapter President: 1995

EXTENDED BOARD COMMITTEE SERVICE - NAME AND YEAR SERVED:

Orange County ALA Community Connections Chair, 2013, 2014 and 2016
Committee Member 2017 ; Orange County ALA Nominating Committee 2013-2014

1) What contribution(s) do you feel that you can make to the Chapter?

I will do whatever is needed of me in my role. I am committed to ALA and when called upon, will serve. The Association has done so much for me, that giving back in any form, whether hands on or as a guide, I will gladly assist.

2) What would you want the Chapter members to know about you on a personal level?

I am pretty much an open book. Authentic, honest and super hard working.

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ALA VIP Program Overview

Find member-exclusive VIP services and discounts from nationally known companies in solution categories like cyber security, technology consulting, office products and video conferencing. The savings provided by ALA's VIP program business partners can add up to 70 percent overall - enough to offset the cost of membership!

- ABA Retirement Funds
- Affinity Consulting Group
- Allied World
- BreachPro
- GLJ Benefit Consultants
- iSolved
- LawPay
- LTC Solutions, Inc.
- National Pension Professionals (NPP)
- Principal
- Quill.com
- Teladoc
- Thomas Reuters myPay Solutions
- Thomas Reuters ELITE
- UPS
- VIBE (Visual Image Building Enterprises)

For more information go to ALA website at htt://www.alanet.org/about/vip-program.

Savills Studley

Savills Studley is the leading commercial real estate services firm specializing in tenant representation. Founded in 1954, the firm pioneered the conflict-free business model of representing only tenants in their commercial real estate transactions.

Today, supported by high quality market research and in-depth analysis, Savills Studley provides strategic real estate solutions to organizations across all industries. The firm's comprehensive commercial real estate platform includes brokerage, project management, capital markets, consulting and corporate services. With 30 offices in North America, and a heritage of innovation, Savills Studley is well known for tenacious client advocacy and exceptional service.

The firm is part of London-headquartered Savills plc, the premier global real estate service provider with over 30,000 professionals and over 700 locations around the world. Savills plc is listed on the London Stock Exchange (SVS.L).

Orange County ALA would like to give Savills Studley a big Thank You for hosting our first Networking Event of the year, Karaoke!









Networking Event January 2018 at Savills Studley

We would also like to thank these business partners for also sponsoring this event:

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Networking Event January 2018 at Savills Studley

MORE THAN TALENT

By Mary Kate Sheridan, Esq.

Client demands are causing firms to visit new models for recruiting

Legal service providers need more than legal expertise to succeed in today's client-driven market. With clients demanding greater efficiency, competitive pricing and stellar service, law firms are under increased pressure to recruit and train more multifaceted employees.

Among the skills critical for the 21st-century legal professional are technological competence, business savvy, emotional intelligence, communication, relationship building and project management. But traditional recruiting and training methods may not be structured enough to cultivate a successful talent base.

SHIFTING PRIORITIES POST-RECESSION

The economic decline accompanying the Great Recession spurred both law firms and their clients to rethink the costs of legal services.

Since the recession, law firm clients have had lower budgets for outside counsel. Clients became less inclined to hire law firms, and since then the market has seen a continuing trend of lower or stagnant expenditure on legal services.

"There was an economic crisis in 2008 and 2009, and it caused everyone in America — including law firm clients — to ask, 'Do I want to pay for that?'" says David Sanders, Chief Talent Officer at Faegre Baker Daniels. The recession prompted clients to rethink how they operated, consider whether they could accomplish certain tasks themselves and question whether they were gaining value from firms' work, he says.

Not surprisingly, law firms have tried to distinguish themselves from other firms, assessing how they can offer competitive pricing and value to clients.

CRITICAL SKILLS FOR MODERN LAWYERING

With client demands changing the legal talent landscape, the need for multifaceted attorneys has become essential. An exceptional pedigree is no longer enough — firms are increasingly seeking candidates with interpersonal, business and technology skills to increase effectiveness and efficiency.

"What is being asked of the modern lawyer is really more than what was asked of them before," says Terri Mottershead, Principal of Mottershead Consulting.

Amani Smathers, Associate Legal Solutions Architect with SeyfarthLean Consulting, describes this phenomenon as T-shaped lawyering. A T-shaped lawyer combines his or her legal expertise with knowledge spanning different disciplines.

"The whole idea of the T-shaped lawyer is you still need the deep legal expertise, but in order to be successful, you need shallow expertise in other areas to allow you to collaborate or have a better practice," says Smathers.

Some firms have found that experience, first and foremost, breeds attorneys with these sought-after skills.

"What we've seen over the past couple of years as a continuing growing trend is law firms looking for candidates who have four, five, six years of experience," says Charles Volkert, Executive Director of Robert Half Legal. These attorneys not only have the ability to jump right in, but also may possess the people skills, business acumen and ability to deal directly with clients that are all increasingly important to the new world of lawyering, says Volkert.

But firms have also looked beyond recruiting to their own training, focusing on developing desired skills in-house.

"Ten years ago, the focus on training was really on substantive skills," says Carolyn Older Bortner, Director of Lawyer Development at Orrick Herrington & Sutcliff LLP. "The move has really been to skills training in the area of leadership, developing client relationships and strong communication skills."

Industry experts have identified the following as crucial for meeting the demands of modern legal services: technological adeptness, business understanding, emotional intelligence, communication, ability to forge relationships and project management.

TECHNOLOGY

Technology has become essential in everyday life, and it is no surprise that this trend has carried into the legal practice. In fact, Thompson Reuters' Midsize Law Firm Survey found that 84 percent of respondents adopted new technology to enhance efficiency.

"This is a growing demand that I don't see slowing any time in the near term, or ever," says Volkert. "[Technology is] one of the areas that we continue to see in high demand." Firms desire attorneys that are tech savvy, understand software, and are highly skilled in e-discovery, among other skills, says Volkert.

Technological efficiency saves money for firms' clients, which is essential in this competitive market. This idea is not limited to high-level technological skills, and it applies to all staff. Technological proficiency is essential in everyday work, such as editing documents and preparing filings. Understanding how to navigate one's computer system and word processing programs, as well as organizing email alone, can greatly enhance efficiency.

E-discovery is another critical area for today's attorneys. Since e-discovery is such a large part of today's practice, attorneys and management staff should be familiar with accepted and emerging discovery practices — such as strategic keyword searching and predictive coding — and the repercussions of these processes on the legal industry. Taking that a step further, attorneys also must be aware of how issues like metadata and native files affect the e-discovery process.

Attorneys should not only understand what metadata encompasses, but also be able to recognize its dangers and how to address potential issues. And that goes beyond a casual computer user's ken.

Attorneys can also benefit from mastering skills like social media and cloud computing for interacting with clients. But if they use such technologies without first gaining expertise with them, they risk running afoul of ethics rules or placing their clients' confidentiality at risk.

Lacking technological proficiency may actually be viewed as an ethics violation. Comment 8 to ABA's Model Rule 1.1 indicates that attorneys must "keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject." Potential violations may lurk anywhere, from electronic document vulnerability to improper document format to poor organization.

Attorneys should strive to educate themselves regarding technological issues or seek the assistance of technology experts within their firms, who should already be familiar with these issues.

Technological expertise doesn't only help law firms avoid pitfalls; it can also set them apart from competitors.

"There's a question of what do you actually need and what do you need to be competitive," says

Smathers. Firms have an opportunity to excel and provide enhanced services to their clients if attorneys and staff develop specific technological expertise.

BUSINESS ACUMEN

Having a business background is a major asset in today's legal industry. Business and financial knowledge are useful tools in providing clients with appropriate counsel to reach their objectives.

More than ever, clients desire attorneys with such skills. More than one-quarter of chief legal officers surveyed in Altman Weil's 2015 Chief Legal Officer Survey indicated they would like law firms to place greater emphasis on understanding the business.

"I think it's important to understand the context in which law firms operate," says Mottershead. "It also helps enormously when working with clients. You need to understand their business and know it very well.

Many attorneys and firms recognize the need for business literacy in legal practice. In a 2013 Harvard Law School survey of attorneys practicing at large law firms, 72 percent of respondents indicated that their firms provided business-methods training. Further respondents rated accounting and financial reporting, as well as corporate finance, as particularly valuable law school courses to prepare future attorneys.

While most law schools have not abandoned their traditional coursework to a more business-focused approach, many have begun to offer practical business workshops and "boot camps." For example, Brooklyn Law School works with Deloitte Financial Advisory Services to provide a business boot camp, focusing on topics like accounting and reading financial statements. Similarly, Cornell offers a three-day weekend course called "Business Concepts for Lawyers." And last year, Harvard Law began offering students access to Harvard Business School's business fundamentals program, HBX credential of Readiness, which is an 11-week program focused on business analytics, economics and financial accounting.

EMOTIONAL INTELLIGENCE

Also critical is taking time to understand other people, especially clients. According to Jordan Furlong, Principal at Edge International, emotional intelligence encompasses a range of attributes, including empathizing and sympathizing with others, listening to others, and listening and hearing the client — not just the client's problem.

"Leadership or other development programs relating to emotional intelligence can have a huge impact," says Sanders, who explains that while attorneys may be intellectually brilliant, they may not be successful if they cannot relate to juries or to their adversaries in negotiations.

Emotional intelligence is particularly important when it comes to client relationships. "I think lawyers today need to be commercially savvy, and they need to understand issues [from] their clients' perspectives," says Bortner.

COMMUNICATION AND RELATIONSHIP BUILDING

While soft skills are not new to the legal practice, there is an increased focus on developing them. These skills include deflecting difficult questions and remarks, collaborating, and building strong relationships.

It is critical that attorneys learn how to effectively communicate directly with clients, even at the junior level. An in terms of relationship building, attorneys should go a step further and focus on their client's experiences.

"Much more than just relationship building and much more than being responsive … much more than having a business sense … [you must focus] on how your client is experiencing the service that you're delivering from start to finish," says Mottershead. That means focusing on thee customer service side of lawyering just as much as the legal work itself.

PROJECT MANAGEMENT

With firms increasingly outsourcing and delegating portions of their work, project management skills have become key in delivering efficient legal services to clients. In fact, according to Altman Weil Inc.'s 2015 Chief Legal Officer Survey, 40 percent of respondents would like outside counsel to offer more effective project management.

Many firms appear to be cognizant of this. Altman Weil Inc.'s 2015 Law Firms in Transition survey found that 43.8 percent of respondents are implementing project management training to increase efficiency of legal service delivery.

"I think [project management] becomes more and more critical as legal services have been unbundled and managed by people outside the firm," says Mottershead. "The ability to manage a project is more than the work before you."

INCORPORATING MODERN SKILLS INTO YOUR FIRM

With clients demanding more multifaceted lawyering, firms are under increased pressure to offer a skilled legal team. But according to Furlong, many firms do not have mechanisms in place to attract such talent.

"The spirit is willing," he says. "The process may still be weak, but I do think there is a recognition — perhaps a dim one — that we probably shouldn't be looking for the same attributes we used to."

But a dim recognition will not suffice as firms strive to remain competitive and service-oriented. Determining whether individuals have certain skills, or creating programs to train on those skills (see sidebar), is not an easy task. Firms must implement competency-based hiring and training methods to find and cultivate talent with the above core skills.

The standard law firm recruiting model — casual one-on-one interviews and a lunch interview — is lacking when it comes to discovering and assessing a person's skill set. Firms require more structure and defined purpose to determine whether candidates possess technological abilities, a business background, emotional intelligence, relevant soft skills, project management abilities and any other skills firms may deem critical to boosting efficiency and client service.

Thus, a firm should implement a structured interview scheme focused on competencies and actual skill assessments, such as writing assignments.

Through competency-based recruiting — which is popular among Fortune 500 companies and implemented by employers around the world — firms can delineate the characteristics they seek and implement standard behavioral questions to assess whether candidates possess these traits. Candidates are all evaluated based on the same criteria, which allows firms to compare candidates while also minimizing the possibility of bias.

A successful competency-based recruiting process is not an easy fix. It takes careful planning and dedication to execute. As part of this preparation, firms should train interviewers on the structured interview process, making them valuable in evaluating candidates' future performance. Firms should also consider ways to customize the structured interview process to make it most effective for their goals. For example, some firms have gone beyond the typical one-on-one interviews and implemented panel interviews and off-site group retreats.

Firms may also consider assessing applicants' skills through structured activities, such as writing tests or group projects with other interviewees.

LOOKING AHEAD

Since the Great Recession, law firm clients have become more focused on price and value, driving firms to seek better methods of delivering legal counsel. This landscape requires attorneys to have core skills that promote efficiency and client

service, including technological abilities, business understanding, emotional intelligence, communication, relationship building and project management. To cultivate these skills within their firms, law firms should employ competency-based recruiting and development methods to inject specific criteria and expectations in their talent management processes.

ABOUT THE AUTHOR

Mary Kate Sheridan is a writer and attorney with a JD from Columbia Law School and a BA in writing from Mary Washington College. She is currently pursuing her MFA in Creative Writing at The New School.

Communications and Organizational Management

CULTIVATING AN ACCOUNTABLE OFFICE

By Kylie Ora Lobell

Accountability breeds trust and productivity. Here's how to make it happen at your office.

Attorneys are constantly busy. If they're not meeting with clients, working on cases or going to court, they're running their firms and trying to bring in new business. For these reasons, it's critical that support staff is on the same page as their bosses and dedicated to the success of their firms.

That's where employee accountability comes into play.

Oftentimes, the word "accountability" gets a bad rap, but it's actually a positive thing, says Allan D. Koltin, Chief Executive Officer (CEO) of Koltin Consulting Group. "It's a process and system whereby leadership helps associates to achieve their goals by working with them, both formally and informally, throughout the year to achieve those goals."

It's important to highlight what accountability really means to get employees on board. If everyone is given responsibility, they have the power to achieve their own ambitions as well as fulfill the mission of the team as a whole.

"Accountability for us does not mean a million policies, forms or meetings," says Nicole Auerbach, Founding Partner at Valorem Law Group. "It means doing great work, being a great team player, learning from mistakes and contributing to the core values of the firm."

To cultivate employee accountability at your own firm, you first need to determine what workers believe their responsibilities are and what you expect from them.

WHAT EMPLOYEES NEED TO BE HELD ACCOUNTABLE FOR

In any office, employees should be held accountable for sticking to their schedules, completing their given tasks, looking and acting professional, treating their coworkers with respect, and being team players.

At a law firm in particular, employees need to uphold confidentiality and "be able to intelligently prioritize their workload, especially in a busy firm where a non-attorney may be answering to multiple partners and staff attorneys," says Peter A. Johnson, Esq., Founder of Law Practice Consultants, LLC.

Koltin says it's crucial that associates have goals for realization, billable time, new business and networking, and professional growth in their areas.

HOW TO ENCOURAGE EMPLOYEE ACCOUNTABILITY

Everyone at the firm wants to feel as if they're a part of something bigger. They crave a purpose, and to be involved with the team.

"If we can activate a higher level of engagement and motivation on the front end, then accountability becomes a much easier task," says David Freeman, CEO of David Freeman Consulting. "People don't like doing things they don't care about doing, so before you can ask someone to be accountable, we want them to buy in to the goal."

Johnson suggested that firm leaders encourage "employees to assume ownership of their area of responsibility, [which] goes a long way toward getting buy-in on accountability. Having some leeway in how assignments are completed is one way to inspire initiative, so long as the work product is good."

Individuals who are higher up in the firm should be willing to mentor administrative workers as well. According to Johnson, this is invaluable for a younger employee.

"Too many law firms invest in mentoring for attorneys but ignore others who make an important contribution to the firm. Mentoring can be effective across the board with paralegals and support staff."

Another useful step leaders can take is making themselves available to their employees. Auerbach says that at Valorem Law Group, they have one-on-one meetings to discuss issues they may want to raise, and "collabostorms," a cross between brain-storms and collaborations, which involve all staff to strategizing on issues for their clients.

"We have created an atmosphere that is open and collegial, and this in turn fosters dedicated and engaged employees."

Compensation should include a bonus or incentive that rewards associates for achieving their objectives throughout the year.

"As you can imagine, it can be quite difficult to get associates to be held accountable for a group of goals when all the firm says that's important (via compensation) is billable hours," says Koltin. "The worst thing that can happen is to give associates goals, not hold them accountable, and then have them be unhappy or surprised at the end of the year when bonuses and/or compensation increases come out."

ACCOUNTABILITY STARTS AT THE TOP

If you want employees to buy in and start being held accountable, management has to lead by example. They must show that they're dedicated to their jobs and the firm, as well as their employees' needs. Management needs to have guidelines, but not be too rigid with the rules.

"A firm that runs fast and loose with the rules certainly won't inspire its employees to toe the line and act responsibly," says Johnson. "At the same time, if firm leadership is too buttoned down, it may suppress and discourage individual initiative. It's a real balancing act."

Johnson says that communication is the key to ensuring that accountability is upheld. It all starts with laying out a clear job description before taking on a new hire, and then giving employees a handbook for firm policies best practices.

Whether it's written or verbal, "Firm management must be open and honest in downward communication, and open and receptive to upward communication. People who feel they are part of what's going on and who trust that their voices will be heard will be a more effective part of the organization," says Johnson.

Leadership should understand the strengths of each employee and how they can help them realize their goals. They should be open to listening and not just speak down to their support staff.

"Find what is important to each person, and then find ways to align their interests and passion with the needs of the firm," says Freeman.

At a firm where accountability is emphasized, every employee feels like he or she counts and is contributing to the firm's goals. There is nothing wrong with holding employees accountable or

Accountable Office, *cont. from page* 18

asking more of them than simply doing their jobs. In the end, accountability benefits everybody at the firm.

"Accountability can often be misunderstood to mean being watched over or checking off all the boxes you have to check to be a good employee, like punching a clock," says Auerbach. "In reality, in an environment where people and the work they do is valued and appreciated, accountability merges into productivity and maintaining a constant level of
excellence."

ABOUT THE AUTHOR

Kylie Ora Lobell is a freelance writer living in Los Angeles. She covers legal issues, blogs about content marketing, and reports on Jewish topics. She's been published in *Tablet Magazine*, *NewsCred*, *The Jewish Journal of Los Angeles and CMO.com*.

ALA Career Center / Job Bank Overview

The ALA Job Bank is an online job bank that connects law firms, corporations, governmental agencies and similar professional service organizations and recruiters with prospective candidates for non-lawyer positions. The job bank service offers two convenient ways to link employers and recruiters to potential employees:

Employers	**Job Seekers**
Employers and eligible recruiters can advertise position openings and search through online resumes to find qualified candidates.	Legal management professionals and legal support staff can post their resumes online in either a public or confidential manner. Job seekers also have the ability to search through job advertisements placed by employers.

The ALA Job Bank accepts and posts ads for legal management and administrative positions, as well as support staff positions such as legal secretaries, legal assistants, paralegals, law clerks and other non-lawyer positions. Job advertisements are also available for positions in professional service organizations (such as consulting and accounting firms) that require skills similar to those of a legal administrator or functional specialist. ALA accepts ads from individual employers and eligible recruiters, but is not currently posting ads for lawyers, or for management positions in service industries and retail settings.

To Learn More Go To: https://my.alanet.org/careers/current.asp

OC-ALA Administrator Spotlight

Shaila Schaible

♦♦♦

Shaila Schaible is the currently the Director of Finance & Administration for Koeller Nebeker Carlson & Haluck, LLP and oversees seven office locations in multiple states. She has been a legal administrator for seven years, and previously was Director of Finance at Higgs Fletcher & Mack in San Diego for six years. She lives in Poway in the San Diego area and drives to Irvine three days a week and works in San Diego twice a week.

Shaila loves ALA and has learned so much from the forums and her peers in other firms. She also values the friendships she's made in ALA and the valued Business Partners she's gained. In fact, Shaila brings a lot of experience to the Orange County Chapter -- she is currently the President of the San Diego Chapter of ALA. What a great addition to our chapter! She is hoping to make some new OC friends to meet for lunch and network with.

The hardest situation Shaila has had to deal with is that of another employee who desperately wanted her job. This is someone she trained, taught, and promoted, but who went behind her back in a vindictive way. It is a lesson that has taught her a lot about the character of people.

Shaila's greatest challenge as an Administrator has been starting a new job where the culture is different and everything needs to be changed or updated. In her new position she oversees both Finance and Administration. The previous administrator had been there for 30 years but did not keep up with the latest trends or technology. There are lots of change to be made, but she'll end up looking like a superstar if it all works out!!

Shaila has four sons ranging from 16 to 28, including one with autism and seizures who is 26. She spent a lot of time in his early years on finding the best therapy for her autistic son which has paid off because he is extremely manageable and quite independent as a result. Being a parent of a special needs child is a unique experience and she sees it as a gift to the family, as they have become more aware of others facing the same challenges.

She most admires her mom who at 81 is still actively working in her own business with her focus on always helping others rather than on herself.

She was born in England, lived in India from age 3 to 11, then emigrated to the United States. Shaila just returned from an epic trip back to India after 32 years, taking all her kids (who are half Indian) for the first time, and traveling with her brother and parents as well. Her parents are 81 and 82 and it was their dream to have all three generations go together, and they paid for everything. It surpassed all expectations!

Shaila loves world travel and cruising! She is a home based travel agent for fun, and books cruises for all her friends. Some of her favorite destinations were St. Petersburg, Russia, Venice, Brazil and all of the Caribbean. Shaila's dream is to retire on a tropical island in a beachfront condo where she can walk on the beach every day! (To this end, she buys a lottery ticket each week)!

ALA Legal Marketplace

http://legalmarketplace.alanet.org/

Your Connection to Knowledge, Resources, and Networking

SEARCH AND FIND - YOUR NEXT BUSINESS PARTNER

- **ALA Exhibitor 2016**
- **ALA Exhibitor 2017**
- **Business Operations & Management**
- **Facilities**
- **Finance & Accounting**
- **Human Resources & Employee Benefits**
- **Intellectual Property**
- **Marketing & Business Development**
- **Practice Management**
- **Technology**
- **VIPs Directory**

Law Firm Leaders Holiday Luncheon 2017

Working Together in Harmony" with Guest Speaker, Freddie Ravel

HOW TO BE RFP SAVVY

Tips for knowing when (and how) to respond to RFPs

By Kylie Ora Lobell

In a different time, a client would hire only one law firm for any and all of its needs. Nowadays, with a saturated market and tightening budgets, clients who need representation are no longer sticking to one law firm for every case.

As a result, clients are diversifying, looking for who can do the best job depending on the case while meeting their budgetary restrictions.

Cue the RFP, or request for proposal. Law firms may receive a few or up to hundreds of them per year, and they have to decide if and how they will respond.

If you're receiving RFPs, here are some tips from consultants on the most effective methods for dealing with and replying to them.

DON'T ANSWER EVERY SINGLE RFP

Responding to RFPs, especially complicated ones, can take hours of work and energy. There is no guarantee that you'll obtain the job, and you end up paying your employees for nothing.

Unless you have a good chance at being hired, it doesn't make sense to send in an answer.

"If you respond to every RFP you're wasting your time, and you have the same chance as winning the lottery," says John S. Smock, a Partner at Smock Law Firm Consultants. "You have to selectively respond when you think you can bring something to the client."

CONSIDER CONTACTING THE CLIENT FIRST

Going in cold on a response is not going to benefit your firm. You should know who your potential clients are and what exactly they're looking for in the firm they hire.

"You have to have a conversation with the client," says Peter Zeughauser, Legal Strategist and Chairman of Zeughauser Group. "You need to find out what the most important criteria for their hiring decision will be."

Ron Beard, also from the Zeughauser Group, says that it's crucial to make contact, "if for no other reason than to ensure there is nothing that would cause the client not to consider your firm."

To get a leg up on the competition, Zeughauser recommends finding an internal source within the client's company. "See if he or she can share insights with you on what might tip the client in your favor."

BE SPECIFIC, NOT GENERIC

You may have a template for your answers to RFPs ready to go, but the content has to change depending upon whom the client is and what the requirements of your relationship will be. If you send in a generic proposal that doesn't match the client's needs, you're not going to achieve the best results possible.

"It's very important to make sure you respond in the context of the client," says Smock. "The client has its culture and its own way of treating its attorneys. You have to find out the criteria for selection and respond accordingly."

Within the response itself, Beard says you should include an executive summary, which is brief and to the point, as well as providing sufficient detail about the relevant experience of the lawyers who will be on the team.

"[Your law firm] should be clear about the work they want to do for the client. You should explain the issue of coverage, too." says Richard G. Stock, a Partner at Catalyst Consulting.

Zeughauser says you'll also want to incorporate some hypotheticals and how you would solve them. Your firm should find out who the decision maker on the response will be, as well as what his or her predilections are.

"The most common mistake is generic proposals," he says. "There is nothing tailored to the clients' specific interests. The people preparing it assume that they know what the client wants without asking."

INDICATE YOUR PRICING

When it comes to pricing, your firm needs to come up with a comprehensive plan. The prospective client is probably going to try to get you to work for less than you're willing to, so you need to have a solid pricing plan up front.

"Firms are a little too open-ended in terms of the pricing information they're willing to put forward," says Stock. "A lot will say they will take the pricing that the client wants. I like the idea of more detail on some of the fees based on successful performance."

Zeughauser says that before writing up a response, your firm should find out what's significant about pricing to the clients and determine what they would be comfortable charging based on the situation.

"Is the total cost of the matter what's most important?" he offers as an example. "Is it cash flow? Would your firm be willing to do the work at less than your typical rates? How important is winning the case versus getting it solved? If there is an early resolution, does your pricing structure align with that? Is it more important that you're predictable, or that you get a great result?"

BE HUMBLE

You know that your firm is great. However, the c lient doesn't know that. They're most likely being bombarded with responses from many top-rated firms. Don't assume that just because you deliver excellent results to other clients that you're going to be chosen.

"On a general tone basis, I still see proposals being written that have a sense of entitlement for the work that existing providers for the client might be communicating between the lines," says Stock. "Either they did the work before, or they've done similar work for other clients."

Instead of going in with the attitude that you deserve this client's business, keep in mind that you don't. Other firms are just as entitled to it as you are. This is a business process, and you have to treat it as such.

"On the positive side, I am seeing more firms prepared to be quite specific in how they are willing to change service delivery and innovate in how they do the work and deliver," says Stock. "It's not for no reason that we're witnessing the arrival of a number of innovation awards for law departments and firms."

TAKING RFPS SERIOUSLY

Nothing is ever set in stone when it comes to your firm. Your client list is constantly changing and evolving, and you always need to be looking forward on how to encourage expansion.

"If you want to grow your law firm as a business, you have to be able to respond to RFPs very well," says Stock. "Even if you're established, some other firm is going to be anxious to break into your market or eat your market share."

ABOUT THE AUTHOR

Kylie Ora Lobell is a freelance writer living in Los Angeles. She covers legal issues, blogs about content marketing, and reports on Jewish topics.

She's been published in *Tablet Magazine, NewsCred, The Jewish Journal of Los Angeles and CMO.com.*

Welcome New Business Partners

We would like to thank the following new (and returning) Business Partners who signed up for 2018! Stop by and introduce yourself at ACES this year!

24 Carrots
Maggie McDowell
150 Baker Street E
Costa Mesa, California 92626
p: (800) 717-1545
e: maggie@24carrots.com
www.24carrots.com

Office Solutions
Scott Elkins
23303 La Palma Avenue
Yorba Linda, CA 92887
p: (714) 692-7412
e: selkins@officesolutions.com
www.officesolutions.com

Agility Acquisitions
Teryn Theisen
1312 17th Street, Suite 520
Denver, Colorado 80202
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e: teryn@agilityacquisitions.com
www.agilityacquisitions.com

TaylorMorse, LTD
Brent D. Tucker
23422 Mill Creek Drive, #135
Laguna Hills, CA 92653
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e: brent.tucker@taylormorse.com
www.taylormorse.com

Corporate Realty Advisors
Jeff Tabor and John Bisnar
7755 Center Avenue, Suite 1100
Huntington Beach, CA 92647
p: (714) 965-6005
e: jtabor@attorneysleasespecialist.com
e: jbisnar@cox.net
www.attorneysleasespecialist.com

Union Bank
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18300 Von Karman Ave., Suite 500
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e: Chris.Calagna@unionbank.com
www.unionbank.com

First Republic Bank
Kendra Edson
1888 Century Park East, 2nd Floor
Los Angeles, CA 90067
p: (310) 772-1934
e: kedson@firstrepublic.com
www.firstrepublic.com

Veritext Legal Solutions
Jeff Koller
20 Corporate Park
Suite 350
Irvine, CA 92606
p: (949) 955-3855
e: jkoller@veritext.com
www.veritext.com

Silver Business Partners

Welcome New Members

OC-ALA is proud to welcome and acknowledge its newest members. We're honored to have you as part of the Chapter and look forward to working with you.

Shaila Schaible
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e: ariela@afa4law.com

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1900 Main Street, Suite 700
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e: thaytack@ptwww.com

Members On The Move

Andrea Greil has changed firms.
She is now at:
Fiore Racobs & Powers
15635 Alton Parkway, Suite 200
Irvine, CA 92618
p: (949) 727-3111
e: agreil@fiorelaw.com

Janet G. Proudfoot, CLM has changed firms.
She is now at:
Clyde & Co US LLP
2020 Main Street, Suite 100
Irvine, CA 92614
p: (949) 567-7846
e: janet.proudfoot@clydeco.us

Monica Perez has changed firms.
She is now at:
Declues, Burkett & Thompson, APC
17011 Beach Boulevard, Suite 400
Huntington Beach, CA 92647
p: (714) 843-9444
e: mperez@dbtlaw.com

Susan Boyko's firm has changed its name.
They are now known as:
Pleiss Sitar, McGrath, Hunter & Hallack

Carolyn Smallwood
455 14th Street NW, Apt. 535
Atlanta, CA 30318
p: (424) 645-9117
www.knowitalls.org

Happy Anniversary - 1st Quarter 2018

December

Donna Williams	25 years
Jennifer Bodenhoefer	8 years
Susan Boyko	8 years
Bruce Whisnant	8 years
Clark Snyder	2 years
Karen Harris	1 year
Tissy Smith	1 year
Sally Emsley	1 year

January

Christine Baldassarre	27 years
Kim Niccoli	19 years
Cathy McDavitt	18 years
Peggy Alexander	12 years
Theresa Lawrence, CLM	11 years
Mary Lou Czerner	10 years
Carol Palmer	7 years
Heather Bradford	6 years
Brian Robbins, CLM	6 years
Donna Smith, MBA/CLM	6 years
Lara Cassidy	5 years
Rachel Alm	4 years
Marina Hegel	4 years
Lisa Endo	3 years
Monica Perez	3 years
David Webb	3 years
Valerie Farrell	2 years
Bruce Flint	2 years
Alejandra Henry-Mouzis	2 years
Angela Tietzer	2 years
Kristie Amato	1 year
Tsui Chu	1 year
Barbara Dorsey	1 year
Paul Manhart	1 year

February

Sandra Ophus	29 years
Mark Bridgeman, CLM, CRM	17 years
Melissa Hawkins	10 years
Socorro De Luna	8 years
Amy Wright, CLM	8 years
Tammy Curtis	7 years
Sariah Para	5 years
Jess Block Nerren	3 years
Marjean Hoyt	1 year
Sylvia Rosas	1 year

OC-ALA's Calendar of Events

www.OrangeCountyALA.org

Thursday, February 8, 2017 | Board Meeting, Irvine

Friday, February 9, 2018 | Annual Chapter Education Summit (ACES), Irvine

Tuesday, February 13, 2018 | Past Presidents/Charter Members Council Meeting, Tustin

Wednesday, February 28, 2018 | General Meeting "Getting a Seat at the Table", Santa Ana

Friday, March 2, 2018 | HR Section Meeting (location TBA)

Tuesday, March 6, 2018 | Law Firm Leaders Forum, Newport Beach

Thursday, March 8, 2018 | Board Meeting, Irvine

Wednesday, March 14, 2018 | Small Firm Lunch & Learn Section Meeting "Roundtable Discussion" Irvine

Thursday, March 29, 2018 | Members Dinner and Installation of Officers, Irvine

To register for an event, click on the link. To view the calendar in its entirety, click here.