



# OC-ALA's Waves

Summer Edition  
2019

Diamond  
Business Partner



## President's Message

*Michael Shuff*

OC-ALA Chapter President 2019-2020

Hello, OC-ALA and welcome to the Summer Edition of Waves! It is hard to believe that it is already August and that we are more than half-way through summer. I hope that you have all been able to enjoy it thus far.

The OC-ALA has been quite busy over the past few months. We have had several General Meetings and Section Meetings that covered a variety of topics including: Improving Team Dynamics, Recruitment and Retention, Earthquake Preparedness, and What is New and Changing in Office Space for Law Firms. There were so many valuable takeaways from these wonderful educational sessions and we are very grateful to all of our presenters and moderators.

We also had the first Networking Event of the board year at TAPS Brewery and Barrell Room in Tustin, where we competed with our Gold Business Partners in Pub Trivia for cash prizes! It was a great time meeting new Business Partners, strengthening connections, and catching up with old friends. Thank you to Adams & Martin Group, Afinety, ASAP Legal Solutions, Christopher Pro Insurance, Lisa Renee Photography, Nationwide Legal, and Rockpile Capital for sponsoring this event.

Platinum Business  
Partners



## Gold Business Partners



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### Newsletter Committee

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### **Orange County Association of Legal Administrator's Mission**

OC-ALA's mission "to meet the needs of its members through education, networking, and the exchange of information" is carried out via programs and events promoting professional education and development, community involvement, and collaboration between members.



We recently wrapped up another great year of Project SELF. This year we contributed to placing 63 high school students in 8-week internships where they learned valuable skills that will help them through the rest of their lives. Witnessing the growth of these individuals is greatly rewarding and I highly encourage anyone that was not able to host an intern this year to do so next year. A huge thank is in order to the Project SELF Committee: Mary-Lou Czerner, Jessica Daugherty, Alejandra Henry-Mouzis, and Janel Ozar. Your hard work and dedication to this program made it possible. Thank you also to all who participated in the scholarship selection process. Those who were able to host an intern, your support of this program is truly the backbone that makes this such a great success! We look forward to another great program next year.

A few of our members have recently returned from the Association of Legal Administrators Chapter Leaders Institute, often referred to as CLI. Each year, if the budget allows, the Chapter sponsors the attendance at CLI of the President, President Elect, Vice President, and two additional members that are serving on the Board or Extended Board that have shown interest in being a part of the leadership of the Chapter. This is a great opportunity for the Chapter's leaders to gain insights in to the strategic plan of ALA Headquarters, learn what other chapters are doing in an effort to bring innovative ideas back to our Chapter, and deepen their relationships with the other members from our Chapter. In Louisville just a couple weeks ago, there was no exception. All the representatives from OC-ALA bonded and have brought back great ideas that will be implemented to improve the education and networking that we offer. If you are interested in attending the 2020 CLI, be sure to alert the Board.

As we continue through summer and roll right in to fall, we have so much to look forward to. We have just two more General Meetings before we have a break until January and the second Finance and Technology Section Meeting on Wednesday, September 4<sup>th</sup>. There are several opportunities to connect with our trusted Business Partners in the coming months. Be on the lookout for this year's iteration of the Foot in the Door program that will take place between September 3<sup>rd</sup> and October 18<sup>th</sup> and will offer a handful of opportunities to win cash prizes. The date of the Premier Networking event that is sponsored by our Diamond and Platinum Business Partners has been moved to September 17<sup>th</sup> and will be at the 3161 Michelson Rooftop Patio. Mark your calendar for our opportunity to thank our BPs at the Business Partner Appreciation Mixer which will take place at Bistango on Thursday, October 24<sup>th</sup>. Head to the OC-ALA website to see the details of these events and to register for all upcoming educational and networking events.

I look forward to seeing you all in the coming months. Please do not hesitate to reach out if there is any way that I can help improve your experience with the Chapter. Enjoy the rest of your summer!



***Project Youth OCBF and the Orange County Chapter Association  
of Legal Administrators wishes to thank the following firms and  
businesses for their participation in  
PROJECT SELF 2019***

*Advanced Depositions*

*Aitken Aitken Cohn*

*Atkinson, Andelson, Loya, Ruud & Romo*

*Aleshire & Wynder LLP*

*Allen Matkins Leck Gamble Mallory & Natsis LLP*

*Brown Rudnick LLP*

*Bryan Cave Leighton Paisner*

*Callahan & Blaine*

*Carothers DiSante & Freudenberger LLP*

*Community Legal Aid SoCal*

*Crowell & Moring LLP*

*DiMarco | Araujo | Montevideo*

*Ferrucci Law Group*

*Fiore Racobs & Powers*

*First Legal Support Services*

*Fisher & Phillips LLP*

*Gibson, Dunn & Crutcher LLP*

*Greenberg Gross LLP*

*Hall Griffin*

*Haynes and Boone LLP*

*Hittelman Strunk Law Group LLP*

*Hughes & Hughes LLP*

*Irell & Manella LLP*

*Jackson Tidus*

*Jones Day*

*Knobbe, Martens, Olson & Bear LLP*

*Latham & Watkins LLP*

*Law Offices of F. Elliot Goldman*

*Lewis Brisbois Bisgaard & Smith LLP*

*Madison Law, APC*

*Malcolm Cisneros, A Law Corporation*

*Manatt, Phelps & Phillips LLP*

*Michael Maguire & Associates*

*Minyard Morris, LLP*

*Newmeyer & Dillion LLP*

*O'Melveny & Myers LLP*

*Orrick, Herrington & Sutcliffe LLP*

*Palmieri, Tyler, Wiener, Wilhelm & Waldron LLP*

*Paul Hastings LLP*

*Payne & Fears LLP*

*Phillips Whisnant Gazin Gorczyca & Curtin, LLP*

*Rizio Liberty Lipinsky*

*Robinson Calcagnie, Inc.*

*Rutan & Tucker, LLP*

*Savills*

*Sheppard Mullin Richter & Hampton LLP*

*Snell & Wilmer LLP*

*Stephens Friedland LLP*

*Stradling Yocca Carlson & Rauth, P.C.*

*Traut Firm*



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***Project Youth OCBF thanks the interns for their dedication and hard work,  
which make this program a success:***

Jose Penaloza	Samantha Aguilera	Genesis Serratos	Emanuel Negrete
Andrea Soto	Alan Cuevas	Graciela Gomez	Guadalupe Navarrete
Ashley Hernandez	Angelica Cruz	Samantha Alarcon	Luciano Borjas
Celia Jimenez	Tony Gomez	Micaela Alvarado	Jaqueline Pineda
Elizabeth Badillo	Mauricio Rosete	Fatima Escutia	Cindy Du
Laryssa Velarde	Jocelyn De La Cruz	Karen Resendiz	Erick Lopez
Monique Garcia	Judith Perez Priego	Elizabeth Gallegos	Tania Chavez
Esmeralda Garcia	Monserrat	Michelle Zuniga	Diego Sanchez
Kathy Vo	Plancarte	Esmeralda Chavez	Samantha Trejo
Natalia Bahena	Guillermo Garcia	Jessica Arana	Genesis Lopez
Ariana Zavala	Crystal Rojas	Vanessa Mora	Clarissa Morales
Mariana Juarez	Gabriela Antunez	Christopher Mejia	Krystal Ramirez
Joseph Acevedo	Bianca Ramirez	Jordan McFarland	Jarlyn Aguilar
Ashley Alfaro		Noemi Portillo	Jose Pillado
Luis Avila			Vanessa Munoz

***Project Youth OCBF gratefully acknowledges  
the support of the following groups:***

Aitken Aitken Cohn	Century High School
Jennifer Bodenhoefer	Godinez Fundamental High School
Community Legal Aid SoCal	Middle College High School
Madison Law, APC	Saddleback High School
Mary Lou Czerner	Santa Ana High School
OCBA Charitable Fund	Seegerstrom High School
Phillips Whisnant Gazin Gorczyca & Curtin, LLP	Valley High School
Robinson Calcagnie, Inc.	



# PROJECT SELF 2019













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## 2019 Project SELF Scholarship Recipients

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### Banyard Scholarship Recipients

<b>Michelle Zuniga</b> Manatt Phelps & Phillips LLP	Seegerstrom High School	\$500
<b>Armando Ventura</b> Paul Hastings LLP	Valley High School	\$500
<b>Luis Avila</b> DiMarco   Araujo   Montevideo	Godinez High School	\$500
<b>Andrea Soto</b> Aitken Aitken & Cohn	Saddleback High School	\$250
<b>Krystal Ramirez</b> The Traut Firm	Saddleback High School	\$250

### OC-ALA Scholarship Recipients

<b>Micaela Alvarado</b> Law Office of F. Elliott Goldman	Godinez Fundamental High School	\$500
<b>Natalia Bahena</b> Carothers DiSante Freudenberger LLP	Godinez Fundamental High School	\$500
<b>Kate Charco</b> Palmieri Tyler	Seegerstrom High School	\$500
<b>Graciela Gomez</b> Latham & Watkins LLP	Godinez Fundamental High School	\$500
<b>Mariana Juarez</b> Community Legal Aid SoCal	Century High School	\$500

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## 2019 Project SELF Scholarship Recipients

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### Presidents Scholarship Recipients

<b>Joseph Acevedo</b> Crowell & Moring LLP	Santa Ana High School	\$200
<b>Elizabeth Gallegos</b> Malcolm Cisneros, ALC	Santa Ana High School	\$200
<b>Esmeralda Garcia</b> Brown Rudnick LLP	Segerstrom High School	\$200
<b>Graciela Gomez</b> Latham & Watkins LLP	Godinez High School	\$200
<b>Celia Jimenez</b> Aleshire & Wynder LLP	Godinez High School	\$200
<b>Montserrat Plancarte</b> Haynes and Boone, LLP	Segerstrom High School	\$200
<b>Mauricio Rosete</b> Gibson Dunn & Crutcher LLP	Godinez High School	\$200
<b>Diego Sanchez</b> Sheppard Mullin	Godinez High School	\$200





**Wednesday, August 28, 2019**

[General Meeting](#)

*Rethinking Profitability in a Changing Marketplace*

Antonello Ristorante

**Wednesday, September 4, 2019**

[Finance & Technology Section Meeting](#)

*Improving Your Back Office Efficiency to Increase Your Bottom Line*

Jones Day

**Thursday, September 12, 2019**

[Board Meeting](#)

Jackson Lewis P.C.

**September 17, 2019**

**Fall Networking Event**

**Event Details to be Announced Soon**

**Wednesday, September 25, 2019**

[General Meeting](#)

*Topic to be determined.*

Antonello Ristorante

[Click here](#) for additional upcoming events  
and to register through the website.



## Business Partner Spotlight



As President of Christopher Pro Insurance Services, it has been a privilege providing professional liability insurance protection and other lines of coverage exclusively to law firms across California for the past 20 years. As importantly, my partner and I have truly enjoyed our long-term business relationship with the OC-ALA since 2005 and the countless personal relationships with the hardest working administrators in ALA. Christopher Pro Insurance Services is one of the last remaining independent insurance brokers in California which specializes in Lawyers' Professional Liability Insurance; we pride ourselves on being able to work only for you, the client, and not for the insurance companies which are constantly looking at their bottom lines. Furthermore, we are dedicated to the timely service and protection of our clients and it remains our passionate goal to develop long-lasting personal relationships as well as providing competitive premiums without ever jeopardizing a clients' coverage or a firm's reputation. It is not a coincidence that there are very few insurance brokers who only specialize in professional liability – working with administrators and lawyers demands an extremely high level of service.

I moved to the United States from England in 1989 and I began my insurance career shortly thereafter as an insurance broker. I quickly learned the vital importance of understanding property & casualty insurance coverage and products across many specialty areas. This training provided me an advantage because I was trained in all lines of insurance coverage, which many brokers presently are not so well versed – Today many agents, brokers and their staff are trained in one area of insurance and they work only within those parameters.

Our agency has differentiated itself from other insurance agencies by our outstanding and responsive customer service and by our specialized knowledge of insurance underwriting and pricing. We know how an insurance underwriter thinks because we have been in that seat and we know what it takes to deliver to our clients the most competitive proposal available in the marketplace. When you place your professional liability insurance or other lines of coverage with our agency, we do not assign you to someone who may or may not respond to you for few days. Our job is to ensure expediency and accuracy with each client contact and to deliver the most efficacious personal service required by our clients – This is how we run our agency.

In addition, we have strategically aligned ourselves with insurance carriers with whom have AM Best strong financial stability, have broad form insurance policy language, and most importantly insurers who will be there to defend and to indemnify, if warranted, when you really need them - An insurance carrier is only as good as the way it handles its claims and protects its clients. We will always provide guidance and direction during critical claims processes to ensure the firm's service satisfaction and its rights under the coverage terms.

In closing, we would like to thank you again for this opportunity to introduce our agency and its core principals. we look forward to hearing from administrators in the OC-ALA and to assist law firms with any specific needs or insurance coverage protection – our goal will always be to provide an administrator with peace of mind that our agency is advocating for the firm year in and year out to lower the cost of malpractice insurance premiums without ever jeopardizing the firm's coverage or the partners' assets.

Mary Chancellor, President

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Email: [mary@christopherproinsurance.com](mailto:mary@christopherproinsurance.com) [www.christopherproinsurance.com](http://www.christopherproinsurance.com)







**September 18–20, 2019**  
**Boston Park Plaza**  
**Boston, MA**



C4: The Legal Industry™ Conference is a one-of-a-kind experience that uses design thinking to create solutions in the legal industry. This event focuses on finance, technology and marketing, finding viable solutions for the industry, law firms and legal departments.

Come prepared to solve one of these four statements:

- **Pricing and Profitability:** How might we identify the necessary data and insights, as well as develop and evangelize best practices, to improve pricing and profitability in any law firm?
- **Employee Life Cycle:** How might we emphasize the many benefits of diverse perspectives and inclusive culture throughout the employee lifecycle to the maximum benefit of the employee and the firm? (The life cycle ranges from recruiting and onboarding to advancement and offboarding.)
- **Client Experience:** How might we better understand the client and create more collaborative partnerships between the firm and the clients that lead to improved client service and business success?
- **Nontraditional Law Firm:** How might we reshape the narrative about the definition of lawyering and the provision of legal services to benefit legal professionals?

For more information, visit the [Conference at a Glance](#) and [Schedule and Education pages](#).

## 5 EARLY WARNING SIGNS YOU WILL HAVE A FEE COLLECTION ISSUE!



By Marc Berger, President

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An inevitable part of running any professional services practice is the issue of managing your Accounts Receivable aging and how you deal with delinquent and defaulted Accounts Receivable. Minimizing your aging and being on top of your billing is a way to maintain a healthy financial practice. Positive cash flow and adequate working capital is the life blood of any professional services practice.

In my 30 plus years in the professional services industry, including being the Partner In Charge (PIC) of the PriceWaterhouseCoopers (PWC) Western Region Real Estate Consulting Practice, I have identified the following 5 early warning signs of prospective collection issues, in the usual progression of how it starts and how it gets more severe as time goes on:

1. **AGING INCREASES.** The client that typically pays their bills almost immediately or within a typical 30-day cycle starts stretching out their payments to 45-60 days. This is the first warning sign you should notice.
2. **ADDITIONAL INFORMATION REQUESTS.** Next, the client starts requesting more information and explanations of various time and tasks on the bill, pushing the aging out further. The client uses the guise of not having “all” the information to justify their lack of timely payment.
3. **QUESTIONING TASKS AND TIME.** At this point the client takes the information provided in #2 above and questions the appropriateness of the tasks completed and the hours spent on their engagement. This conversation may take place directly with the billing partner or with the appropriate administrative person. It is important for the administrative person to have good communication with the partner. If both parties are talking to the client about billing it is inevitable that the client will say that the partner told them something different than what the administrative person is telling them.
4. **REQUEST FOR A DISCOUNT/PAYMENT PLAN.** At this point the client will request that the bill be reduced, arguing that it is taking too much time to complete a certain task or that the tasks completed were either unnecessary or ineffective. Either in conjunction with a discount request or separately the client will ask to make a partial payment. This will include some form of payment plan to extinguish the debt over time and is usually a trap to keep the service provider working. The result, however, is that the receivable continues to build up. It is usually difficult to make a stop working decision for a client that has been paying at least something, but the risk of and what actually happens is that the receivable continues to grow. The firm gets further in the hole as additional hours are spent exasperating the collection issue.
5. **NONRESPONSIVENESS.** At this point the client stops communicating. Usually the billing person has made multiple attempts to communicate including sending letters, emails, text messages and phone calls. The client’s nonresponsiveness usually coincides with the client’s lack of need for further professional services or at a point reasonably thereafter. The client also defaults on any payment plan that was negotiated with or without a billing discount. I have made it a practice that any billing discounts given are conditioned upon the timely payment of the balance of the billings. If the future payments are not made timely the discount is rescinded and the full bill will be due and payable.



After the client relationship has reached #5 a business decision needs to be made about what to do next. Professional service firms are hesitant to take collection action against former clients because of:

- Risk that the former client will file a malpractice claim.
- Fear that a collection action will hurt the professional's reputation.
- Belief that the former client doesn't have the ability to pay.
- Awkwardness in pursuing former clients.

In many cases firms end up doing nothing because of the above concerns and just write off the receivable. However, there is another alternative to a complete write off of the receivable.

Our firm Rockpile Capital was formed to address this need within the professional services industry. Specifically, Rockpile Capital does the following to address these concerns as follows:

- We do not initiate collection efforts until after the statute of limitations has run, thereby mitigating the risk of a malpractice claim.
- When collection lawsuits are filed, they are filed by Rockpile and not the firm initially owed the money. Part of Rockpile's solution is to take ownership of the debt. In this way Rockpile is the "bad guy" in the collection action. When a collection action is taken, and the former client calls the firm to complain, the firm can legitimately say we "sold" your receivable and don't have any say in what is happening.
- Rockpile Capital is not a collection agency. It does not harass debtors with phone calls and letters. Rather Rockpile performs its collection work via sophisticated, well-respected creditors' rights attorneys.
- Rockpile can scale the passiveness or aggressiveness of its collection efforts from "tread lightly" to "leave no stone unturned".

Rockpile has created a structure that mitigates the legal liability and reputational concerns of the firm and has eliminated the financial burden of pursuing a claim. Many law firms possess the skill sets in-house to pursue claims themselves but don't think it makes financial sense to do so. Generally, firms feel they have exhausted their own ability to collect or believe that the client just can't pay. The firms don't want to incur additional time and effort to pursue old bills rather than bill and collect on current work with clients that pay timely. It is proven that Rockpile has achieved better results than firms attempting to collect on their own, even those with the in-house skills to do so.

Moreover, Rockpile advances all the costs associated with the collection process and the costs are nonrecourse to the firm that has assigned the debt to Rockpile. There is a clear alignment of interest between the parties since

Rockpile Capital incurs the costs for top-notch asset and income investigators, process servers and lawyers. If Rockpile Capital is unsuccessful in the collection effort, it bears the cost of the collection effort, which can be substantial.

Rockpile Capital has also been very successful in conducting a "Write Off Audit", free of charge to our clients, where we look back at past write offs up to four years from date of last service. We have found, in many cases, that the former client may not have had the ability to pay their bill at the time but now their financial situation may have improved to the point where they can now make some form of payment.

[cont. on page 21](#) 

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## SILVER BUSINESS PARTNERS

**AHERN** | INSURANCE  
BROKERAGE



**ePIQ**

**Gensler**

**RICOH**  
imagine. change.

**VERTEX**  
Business Interiors



The Standards Advancement for the Legal Industry (SALI) Alliance is a not-for-profit organization comprised of legal industry professionals from legal operations, law firms and solution providers with the goal of developing open, practical industry standards for efficient and innovative legal services.

SALI officially launched on April 11 in conjunction with LMA's Annual Conference in New Orleans. An integrated payment system has been brought online and it is now actively taking memberships. It has received endorsements from the Association of Corporate Counsel, GlaxoSmithKline, Microsoft, Shell, Citi, Allen Matkins, Baker Donelson, Greenberg Traurig, Honigman, Perkins Coie, Intapp, Prosperoware and Foundation Software Group. SALI Alliance is a recently created independent, not-for-profit member organization focused on facilitating a more transparent and efficient market for the buying, selling and delivery of legal services.

SALI Alliance is all-inclusive for firms, clients, organizations and industry technology and service providers. SALI was created to ensure all stakeholders in the industry have a voice to shape the most useful and relevant standards for fostering transparency. The Legal Marketing Association (LMA) and the Association of Legal Administrators (ALA) are the two founding organizations of the SALI Alliance, and the founding Board consists of Toby Brown; Oliver P. Yandle, JD, CAE; and Betsi Roach, MIM, CAE.

ALA has partnered with the Legal Marketing Association (LMA) to create the SALI Alliance (Standards Advancement for the Legal Industry). This is a complementary effort to ALA's UPBMS and focuses on developing new standards to address the needs of more sophisticated buyers (clients) and service providers. The goal is to develop consistent definitions of the types of work lawyers do (dispute resolution, transactional services, etc.). SALI Alliance is initially building a standard for describing legal matters to foster innovation and provide consistency for buyers and sellers of legal services.

Any company or organization can become a member at [sali.org](http://sali.org). Members can participate in defining the legal services market through regular SALI standard committee meetings. Membership tiers are offered for clients, law firms, solution providers and other industry stakeholders.

SALI promotes an inclusive industry neutral standard for the progress of legal industry transparency, efficiency and innovation. It was founded by the Legal Marketing Association (LMA) and the Association of Legal Administrators (ALA). Its mission is to create a common language for all participants for the delivery of modern legal services.

[sali.org](http://sali.org) Twitter: @SALIalliance



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# Administrator Spotlight

## *Andrew McPhee* Newmeyer & Dillion LLP

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**Name:** Andrew McPhee

**Firm Name:** Newmeyer & Dillion LLP

**Main responsibilities at firm:** HR Generalist/Benefits Administrator

**Number of Years as Legal Administrator:** 1 yr. 5 mos.

**Legal Experience (prior and current):** Newmeyer & Dillion is my first experience in the legal field.

**What do you like best about being a Legal Administrator?** I love the daily challenges, fast-paced environment, and having great managers that have a vision for the future.

**What do you like least about being a Legal Administrator?** The biggest challenge for me is being so green to the legal field and learning as quickly as possible in such a fast-paced environment.

**What is the hardest situation you have had to deal with?** I enjoy being faced with difficult hiring decisions, when determining the best fit for the Firm. Time sensitive inquiries related to benefits are tackled with stride, can sometimes be frustrating, but strengthen my knowledge bank for similar occurrences in the future.

**What is the strangest or funniest thing you have had to do as an Administrator?** Maintain my composure at an HR conference when my slacks split at the seam (going all the way down), just before the main morning session, and two hours before the nearest retail store opened its doors for the day.

**How did you get into the legal field?** Entering the legal field presented a new challenge for me, and I enjoy stepping outside my comfort zone to build skills both personally and professionally.

**Greatest challenge as an Administrator:** Maintaining the balance of morale in the office, while trying to encourage team building and acceptance to change.

**Details about your family:** I am the youngest, born into a family of teachers. I was the black sheep that opted not to get into teaching (training still counts though, right?), and the only one that relocated at a distance longer than a two hour drive. My parents just celebrated their 49th wedding anniversary. I have two incredible older sisters, 4 wonderful nieces and an amazing nephew between their two families. I prefer to be the FUNcle, and have been very close with my nieces and nephew since they were all born - I am the godfather to all five of them.

**Person you most admire and why:** My grandfather, who actually passed away 20 years ago. He taught me dedication, hard work, kindness to all, putting family first, and always finding a moment to take a quick break when you are working hard.

**Favorite past time outside of the office:** I love running near the beach. I will occasionally do 12-mile runs for fun, as long as my playlist keeps going.





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# Beat the Clock Following a Data Breach

**There are legal requirements your firm must meet after a breach — do you know what to do?**

**Cyberattacks are commonplace — every law firm has experienced an attack in one form or another. While most attacks don't result in the exposure of information, those that do present a risk to law firms.**

All attorneys and firms are privy to sensitive client data, so they are ripe targets for hackers. “Law firms are a treasure trove of personally identifiable information,” says Kris Wasserman, Regional Vice President at Special Counsel, a provider of legal technology and e-discovery solutions. And hackers mine that personal data to steal identities.

If you feel a sense of security being a smaller firm, you shouldn't. While a recent ABA study revealed that one in four law firms with 100 attorneys or more reported cyber breaches that resulted in the exposure of data, 52% of firms with 10 to 50 attorneys experienced similar breaches — more than twice the rate of larger firms. It's an eye-opener for small firms and solo practices.

In the event of a data breach where personally identifiable information is exposed, all law firms are required by law to notify affected individuals in a timely manner.

## A PATCHWORK OF LEGAL REQUIREMENTS

Nearly every business or law firm must conform to breach notification laws. However, the legal requirements for notification are complicated. Each state has its own rules on when and how to notify.

“The state where the affected people live will determine what triggers the duty to notify, the form of notice and how much time you have,” says Wasserman. “Each state defines personally identifiable information differently. Each state defines what constitutes a breach a little bit differently. Each state has their own exemptions and rules about the form of the notification and the types of businesses that must comply.”

In addition to state laws, legislation like the Health Insurance Portability and Accountability Act (HIPAA — the federal law restricting the release of health information) and the GrammLeach-Bliley Act (the federal law requiring financial institutions to explain how they share and protect their customers' private information) may apply if your firm handles the type of data covered by these laws. The European Union's General Data Protection Regulation (GDPR) applies if personally identifiable information of EU citizens is exposed. And client service agreements may also have provisions — something that is increasingly becoming more popular, according to James Harrison, Chief Executive Officer of INVISUS, a cybersecurity company with law firm experience.

## THE CLOCK IS TICKING

The common theme among all legislation is that the notification clock starts when a breach is discovered. At that point, you have somewhere between 30 and 60 days to have notifications in the mail to each affected person. Failure to notify on time will get your firm into hot water, including the possibility of significant financial liability or reputational damage.

Uber and Equifax waited months to report their highly publicized breaches and, as a result, both company's management teams were dismantled and both suffered stock devaluations. Due to the gravity of some notification laws, law firms that don't act quickly on the requirements can fail within months following a breach, according to Harrison.

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## **BE DEFENSIBLE: HAVE A PLAN**

The tricky part is, how do you meet all the individual state obligations in 30 to 60 days when you have 50 sets of rules?

“Be prepared to be defensible with a response plan that’s documented, thorough and practiced,” says Harrison. With such a plan in place, “responding to a breach becomes much simpler and offers much more protection for the reputation and the financial risk to the firm,” he says.

Being prepared involves understanding what kind of data you store, which states or countries you do business in, and which states or countries your clients do business in. You’ll need to know the rules for each state or country.

Firms can do this work on their own or hire a specialist to sort this out. But the most convenient path is to carry cyber insurance. Insurance carriers are experts in the notification process and have quick access to response experts, including forensic teams that determine if a breach requires notification and legal experts to sort out when and how to notify.

## **HOW TO RESPOND TO A DATA BREACH**

Regardless of the path you choose, there are several steps in the process.

1. **Preserve the evidence:** Don’t overwrite or delete anything. Secure it for investigation.
2. **Initial discovery:** Do a quick investigation into suspicious activity and validate that a breach has occurred. In general, potential exposure or theft of information qualifies as a breach.
3. **Containment:** Take steps to contain the problem and prevent more loss. If necessary, isolate affected computers from the network.
4. **Contact your cyber insurance carrier or an expert:** If you have cyber insurance, your insurance company has response teams in place and ready to go, including experts in computer forensics and state law. They will guide you through the process.
5. **Deeper discovery:** Dig deeper to determine the full scope of the breach and whether personally identifiable information was exposed. If so, the next step for your firm, expert or insurance carrier is to sort out whether the breach requires notification based on state laws or federal regulations.
6. **Take corrective action:** Once a breach is confirmed and the scope of the breach is determined, you can clean and restore affected computers and devices, apply security updates and patches, or implement other safeguards.
7. **Notify individuals:** If the breach meets a legal standard for notification, you must mail notifications by the deadline, and it must follow the form required by the applicable laws. Notifications are generally specific as to the type of data exposed — such as Social Security number, date of birth or credit card numbers — and the type of remediation required by law, such as credit monitoring for a specific period of time. Your firm, expert or insurance carrier writes the notification based on applicable laws and produces and mails the notifications.
8. **Notify government authorities:** Typically, if data for 500 or more individuals is exposed, you’re required to contact the state attorney general or other authority. Be aware that some states require this for a breach that exposes any number of individuals.
9. **Control the message:** For large breaches, some states and regulations require public notification through the press. But it’s a good practice for firms to control the message in order to preserve the firm’s reputation.



### **Delivering Exceptional Service in the Changing Litigation Support Market**

Over the past decade, reliance on legal support companies has been steadily increasing. In addition to the increased demand, litigation support providers like First Legal are also facing heightened client expectations. To meet these expectations, we must embrace the latest advancements in legal technology, deliver effective services and take an active role in risk management.

#### **Legal Technology**

When it comes to legal technology, it isn't enough to simply keep up with the curve. One of the biggest markers of top litigation support providers is the willingness to incorporate new programs into daily workflow. From remote depositions to eFiling, early adopters of new technology consistently obtain a competitive advantage.

For many litigation support providers, it can be tempting to delay incorporating new technology. We instinctively begin to tackle the problem in increments, particularly when financial investments are involved. Although it does take time to implement and maintain new processes, cultural-level shifts only occur when we integrate new technology into our daily work.

Ultimately, changing department ecosystems can be time-consuming, but doing this work represents an important investment in your clients and demonstrates your willingness to grow with industry changes.

#### **Holistic Service Offerings**

In the age of overnight shipping, subscription services and 1-click ordering - it comes as no surprise that our clients frequently take advantage of our File Thru Trial service. From pre-file investigations and research to post-trial appeals and judgement collection, our integrated services provide a unique blend of operational effectiveness and strategic agility.

The companies we serve are typically looking for a partner that can grow alongside them, consistently handling increased volumes of work. Our six departments work together to function as a one-stop service option. This produces a significant return on investment for our clients, and offers the opportunity to implement cost-containment programs and centralized billing.

#### **Risk Management**

As legal support service providers, it is incumbent on us to create third-party risk programs that safeguard client data. Every day, we work with massive amounts of data, representing varying degrees of confidentiality. In order to provide fast, efficient service, First Legal developed a secure, seamless process for transferring information between our departments.

Managing cyber security risks can take many forms. For example, it may involve better data hygiene, for existing data and new data intake. The fluid nature of the legal industry makes it critical to approach risk management from a broad perspective.



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## First Legal, *cont. from page 20*

Within the First Legal family, we believe it is our professional responsibility to ensure regulatory compliance while investing in disruptive technology. When we manage client information efficiently, it enables us to gather relevant, useful insights over time. These insights often result in cost-savings and bring added value to our clients.

### **Closing Thoughts**

As you look to the future of the legal support market, it's important to recognize that industry trends are constantly developing. By tracking these developments, you can see a much clearer picture of the evolution of client expectations.

For over 20 years, we've worked to provide exceptional legal support services while committing to constant advancement. In that time, we've come to recognize the importance of early technology adaptation, dynamic service offerings, and proactive risk management. We've seen that clients want flexible billing and communication, transparency of information and frequent order updates. By embracing these practices, you can improve client satisfaction, increase efficiency and achieve predictable, successful results.

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## 5 Early Warning Signs, *cont. from page 15*

In addition, Rockpile capital has been effective in both obtaining and enforcing previously receive judgments.

In summary, keep on top of the 5 early warning signs that progressively lead to a collection issue. You can effectively manage and stop the progress of a collection issue at any point. There are instances and circumstances that happen, and every firm ends up with some collection issues no matter how diligent and effective they are. In those cases, there are resources available to help you obtain a recovery.

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## Beat the Clock, *cont. from page 19*

### **FOLLOW BEST PRACTICES**

Attacks are constant and mistakes happen, even in the most secure environments. The best defense against the legal fallout following a breach of personal data is to follow best practices in securing your environment, which includes having a plan in place to respond to a possible future attack.

If Uber and Equifax are valid lessons, then the health of your law firm post-breach will depend less on the fact that you were breached and more on your ability to meet the legal requirements to respond.

### **ABOUT THE AUTHOR**

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Phone: 1-815-565-7272

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## Bronze Business Partners



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## Upcoming ALA Webinars

- \* **AUG 14 - HOW TO SKYROCKET YOUR PERSONAL BRAND WITH SOCIAL MEDIA: THE PERSONAL BRANDING POWER HOUR**  
Learn how to effectively implement a personal branding program to grow your reputation and teach your staff to further their personal brand as well. Social media is one of the most powerful tools ever invented to grow your personal brand, but where should you start and how ...
- \* **AUG 15 - CONFRONTING THE OXYMORON: THE ECONOMICS OF WELL-BEING**  
The spotlight on mental health and well-being in the legal profession has never been brighter. More law firms, legal departments, and law schools are establishing programs to do better, including signing the ABA's Well-being Pledge. Altruism isn't the only motivator for organizations taking better care of the health of their workforce. There's also a compelling economic rationale. The \$9.1 billion lost to ...
- \* **AUG 22 - PERFORMANCE APPRAISALS IN LAW FIRMS: YES, THEY DO MATTER**  
Now more than ever, letting your employees know how they are performing is one of the most important aspects of any law firm manager's job. Whether a partner, shareholder, member, associate, manager or supervisor, those with evaluation responsibilities in law ...
- \* **SEP 4 - AMPLIFYING YOUR IQ (INNOVATION QUOTIENT)**  
Without question, we are living in a time of unprecedented change and unpredictability. Organizations that cling to the status quo, fearful to experiment with new ideas, are risking obsolescence. This is especially true for law firms, which historically have been averse to risk-taking yet now find themselves facing enormous challenges that require bold, out-of-the-box thinking. In this interactive session, attendees ... [show More](#)
- \* **SEP 10 - CONTINGENCY PLANNING – IS YOUR FIRM FINANCIALLY PREPARED FOR THE UNEXPECTED? BROUGHT TO YOU BY NEXTPATH LEGAL**  
Unexpected life events don't just affect individuals—these ripple events have the potential to harm an unprepared firm. When an attorney at your firm has an incident that causes her to miss time, either temporarily or permanently, how will her absence affect the firm ...

## Upcoming ALA Webinars (continued)

\* **SEP 18 - TIME MANAGEMENT IN THE NEW MILLENNIUM**

Attendees will learn to implement a proven technique, helping them to redefine the concept of work and time management to meet their current challenges. Elevate your visibility to increase results in your role. Implement the First Things First framework to identify time stealers and time wasters so you can do the work that matters ...

\* **SEP 18 - CURRENT LONG-TERM CARE INSURANCE MARKETPLACE: WHAT'S AVAILABLE FOR MY FIRM**



**Free Webinar** Bring your thinking caps and questions as we explore the world of Long Term

Care planning for law firms. National experts and sought-after speakers will take a detailed look into the realities of Long Term Care and how employees are impacted, both personally and professionally. Learn the key takeaways to educating employees about this growing benefit. This course is designed to be ... [show More](#)

\* **SEP 25 - RETIREMENT PLANNING – NAVIGATING THE PLANNED EXIT FROM PRACTICE BROUGHT TO YOU BY NEXTPATH LEGAL**

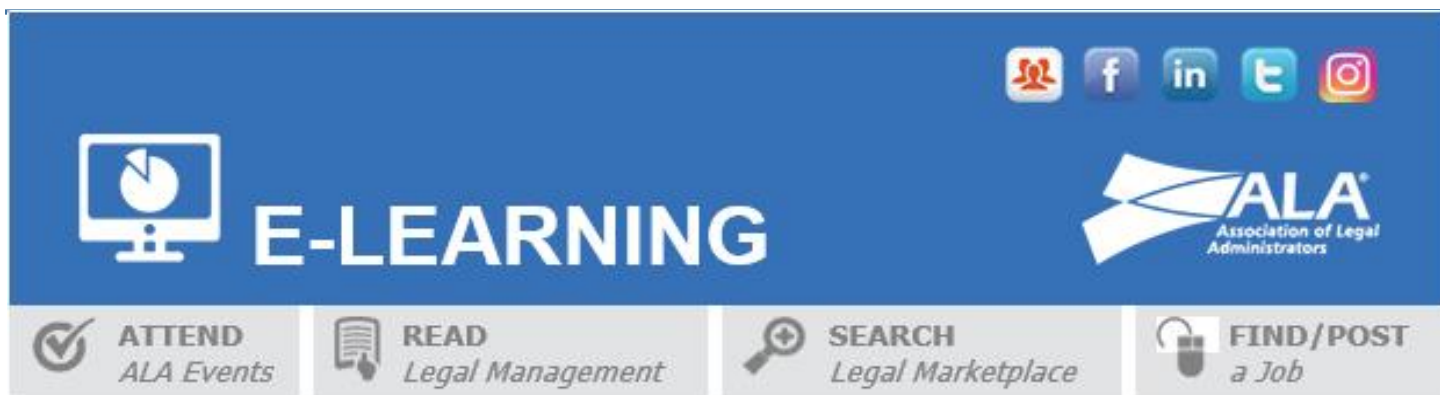
Everyone wants to retire someday, but attorneys face unique challenges. Walking away from their life's work and clients who have trusted their advice for years can be difficult. But before these issues can even be considered, the attorney must be prepared to provide for ...

\* **OCT 8 - DELEGATION DYNAMICS**

Most people agree with the general concept that more work can be accomplished by a team than by an individual working alone. Effective legal administrator must delegate, and delegate well. This presentation will enhance the skills of legal administrators in the art and management of delegation ...

\* **OCT 16 - BLOCKCHAIN: AN EVOLUTION OR JUST THE NEXT PASSING THING?**

No, blockchain and bitcoin are not the same thing, despite what you may have heard! But the technology evolution has been underway for several years and is starting to gain traction in many industries. In fairly short order, we will cover the basics of this evolving technology ...



## Registration Is Open for Two e-Learning Courses

### Get six weeks of more advanced HR or FM education

“The course had excellent, relevant content, and without immediately realizing it, I began to reference what I was learning while communicating with my staff. I took the course as a supplement to my CLM training, but I would highly recommend it as a stand-alone CE option. I am very glad I made this investment and looking forward to the next session already!”

Jennifer M. Hudson  
Administrator  
Starzyk & Assoc., PC

You can now register for the following courses:

	Registration Closes	Start Date	End Date**
<a href="#">HR2: Performance Management and Compensation</a>	Sept. 13	Sept. 19	Oct. 24
<a href="#">FM2: Financial Information and Analysis</a>	Sept. 13	Sept. 17	Oct. 22

**\*\* Learners have access to archived materials 10 weeks after the course ends (16 weeks total).**

Each [e-learning](#) course is comprised of six interactive weekly sessions that will teach you new skills and tools while delivering continuing education (CE) credits. Live sessions led by an instructor — experienced both in teaching and in the subjects they’re discussing — will provide in-depth education about human resources or financial management. The sessions will also be recorded for on-demand access at students’ convenience.

[REGISTER »](#)

Those who purchased a package that bundles together HR1 and HR2 or FM1 and FM2 are, assuming they pass both courses, on track to earn a [Legal Management Specialist Certificate](#) for their chosen discipline, which can be a valuable addition to your résumé. Although the registration periods for the 2019 editions of [HR1](#) and [FM1](#) have passed, the courses will return next year.





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## Are You Aware of All Our Resources?

### **Elevate your career — tools to use and events to attend**

The [Legal Management Resource Hub](#) is designed to collect recent educational offerings — in all their many forms — in one place, making it easy for legal management professionals to find what they need to answer questions, propose solutions and earn CE credits. There are hubs for [HR](#), [finance](#), [C-suite](#) and [law firm management essentials](#).

In the Resource Hub, you'll find:

- Video recordings of past conference sessions
- Related [Legal Management](#) articles and CE courses
- Related [Legal Management Talk](#) podcast episodes

Upcoming and on-demand [webinars](#)

Upcoming [e-learning courses](#)

Additional tools and resources, like the [Job Description Toolkit](#)

The [Advanced HR Administration for Legal Management Professionals](#) conference is being held October 21 in Seattle, Washington, immediately before the [ALA Master Class: Leadership for Legal Management Professionals](#). If you attend, you'll benefit from high-level education that positions human resources as a strategic component of a firm, legal department or other organization. You'll feel confident that you're out ahead of demands — especially in terms of recruiting and retention — placed on HR professionals in the legal environment.

### **Your career-focused, anytime, anywhere learning solution**

**Legal management education in a flexible, on-demand format.**

#### **Expert Instruction – Skill Building – Networking**

- **6-week instructor-led online courses.**
- **Classes meet live each week for an hour.**
- **Classes are available on-demand later at your convenience.**

	Member Pricing	Nonmember Pricing
Individual Course	\$549	\$679
Package (Seats in both HR or FM courses)	\$999	\$1,249



## Certified Legal Manager (CLM)<sup>SM</sup> Certification Program

PROFESSIONAL RECOGNITION. PERSONAL PRIDE.

**CLM<sup>SM</sup>**  
Certified Legal Manager




*Your connection*  
to knowledge, resources and networking



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# NEW MEMBER WELCOME

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



## **Kimberly Caldarone**

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**Naomi Fang**

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Director of Operations

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**David Webb**

New Title:

Director of IT & Accounting

---

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**Janelle McPoland**

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# Business Partner Updates



## **Tara Baseil**

All-State Legal's New  
Marketing and Events Coordinator

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[tbaseil@aslegal.com](mailto:tbaseil@aslegal.com)

Direct: 908.956.6549

Fax: 908.272.1692

# Why Diversity and Inclusion?

What Is Diversity and Inclusion? Diversity and inclusion are about recognizing, respecting and valuing differences based on gender, race, skin color, ethnicity, national origin, age, religion, physical ability, and sexual orientation. This also encompasses an infinite range of individual characteristics and experiences, such as communication style, career path, political views, educational background, geographic location, income level, military experience, marital status, parental status and other variables that influence personal perspectives.

This kaleidoscope of life, work and cultural experiences — our individual uniqueness — causes each of us to view situations, opportunities and challenges through a different lens, resulting in different ways of thinking and making choices. Organizations that will be successful in the future demonstrate a high degree of competence in their ability to harness the benefits this diversity of vision, thought and perspective offers, tapping into this rich wealth of resources to leverage superior business performance.

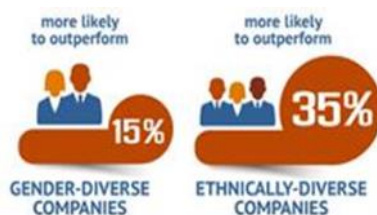


## Homogeneity may adversely affect behavior.

In addition to understanding the business case for diversity, we should also be looking at the case against homogeneity. Evan Apfelbaum, the W. Maurice Young Career Development Professor of Management and an Assistant Professor of Organization Studies at the MIT Sloan School of Management, says, *“Emerging research suggests that homogeneity can lead individuals to underestimate the actual complexity of group tasks because they assume that others’ behavior is more predictable than it actually is.”* See more at [mitsloanexperts.mit.edu/diversity-in-the-workplace](https://mitsloanexperts.mit.edu/diversity-in-the-workplace).

## Why Diversity? Fast Facts:

- Clients are requiring firms to meet outside-counsel guidelines and holding them accountable for meeting specific diversity and inclusion goals.<sup>2</sup>
- Among companies with more than \$10 billion in annual revenues, 56 percent strongly agreed that diversity helps drive innovation.<sup>3</sup>
- Diversity is an area in which law firms have traditionally not competed well.<sup>4</sup>
- Diversity jolts us into cognitive action in ways that homogeneity simply does not.<sup>5</sup>



- When teams had one or more members who represented a target end user, the entire team was as much as 158% more likely to understand that target end user and innovate accordingly.<sup>6</sup>
- The importance and value of a more diverse and inclusive legal profession goes well beyond dollars and cents. A diverse and inclusive legal profession is fundamental to social justice.<sup>7</sup>

Source: McKinsey analysis; see resource #1



- Diversity is associated with increased sales revenue, more customers, greater market share and greater relative profits.<sup>8</sup>
- There are five generations in the workforce today – unprecedented in history – and profitable processes demand the ability to effectively manage cross-generationally.<sup>9</sup>

## Beyond Diversity: Inclusion = Success

*"What happens if you, individually or organizationally, are not more inclusive? What hurts if nothing changes? What critical or amazing opportunity is not accessible to you if nothing changes? If you are having trouble answering these questions, you have just hit the wall that stands between your inclusion efforts and your inclusion results. Ask the above questions of different people in your organization and see what you can learn from the responses."*

Arin N. Reeves, JD, PhD

- Inclusion is more than a program; it should be woven throughout every aspect of an organization's philosophy.
- The best way for firms to support women and diverse attorneys is to have a leadership structure that features attorneys like them. When diverse lawyers look up, they want to see successful women, black, Latino, Asian and LGBT leaders. They want to know that there's an opportunity for them, too, to reach that level.<sup>4</sup>
- An inclusive platform for diverse attorneys to succeed — supported and funded by the firm — may identify and propel a new generation of leaders that reflects demographically what law firm management should be.<sup>4</sup>
- In most law firms, professional development and diversity and inclusion are separate initiatives. Instead of having committees for both, invite a group of lawyers and professionals from both areas to join an advisory group to share perspective and thoughts, and then ask participants to set a living example for others. While subtle, the minor change can be a powerful way to shift the focus to behavioral outcomes.<sup>10</sup>



*The Association of Legal Administrators is the nonprofit trade organization representing professionals in legal management.*

**ALA is the undisputed leader serving legal management professionals**, focusing on delivering cutting-edge management and leadership events, resources and services for its members and the global legal community. ALA offers powerful opportunities for knowledge, resources and networking that link productivity with profitability.

Led by its Committee on Diversity and Inclusion, ALA is committed to this initiative within the organization, its membership and the legal profession as a whole — including but not limited to differences of race, ethnicity, national origin, culture, skin color, personality, geography, gender, gender identity, sexual orientation, age, ability, political or religious affiliation, socioeconomic status, or military experience.

A full library of free, dynamic resources can be found on this website. The [Diversity & Inclusion Scorecard for Law Office Administrators](#) provides best practices and examples and offers a tool to measure your current efforts. Use the scorecard to earn the “We Participate” seal for your website, along with recognition validating your organization’s achievement. Download and print this brochure, [Why Diversity and Inclusion?](#), or contact the Committee on Diversity and Inclusion at [diversity@alanet.org](mailto:diversity@alanet.org) to request printed copies. Join the diversity and inclusion conversation in its social media discussions.



## Resources

1. “Why Diversity Matters.” [mckinsey.com/businessfunctions/organization/our-insights/why-diversitymatters](http://mckinsey.com/businessfunctions/organization/our-insights/why-diversitymatters)
2. “IILP Review 2017: The State of Diversity and Inclusion in the Legal Profession,” The Institute for Inclusion in the Legal Profession, pp. 52-55. [theiilp.com/resources/Pictures/IILP\\_2016\\_Final\\_LowRes.pdf](http://theiilp.com/resources/Pictures/IILP_2016_Final_LowRes.pdf)
3. “Fostering Innovation Through a Diverse Workforce.” [forbes.com/forbesinsights/innovation\\_diversity](http://forbes.com/forbesinsights/innovation_diversity)
4. “Embrace Diversity as a Business Imperative,” New York Law Journal. [cadwalader.com/uploads/news/3f0392fc8e18c872f42465a70f8a6bd4.pdf](http://cadwalader.com/uploads/news/3f0392fc8e18c872f42465a70f8a6bd4.pdf)
5. “How Diversity Makes Us Smarter.” [scientificamerican.com/article/how-diversity-makes-us-smarter/](http://scientificamerican.com/article/how-diversity-makes-us-smarter/)
6. “The Evidence Is Growing — There Really Is a Business Case for Diversity.” [ft.com/content/4f4b3c8e-d521-11e3-9187-00144feabdc0](http://ft.com/content/4f4b3c8e-d521-11e3-9187-00144feabdc0)
7. “The Business Case for Diversity: Reality or Wishful Thinking?”, The Institute for Inclusion in the Legal Profession and the Association of Legal Administrators. [theiilp.com/CaseforDiversity](http://theiilp.com/CaseforDiversity)
8. “Does Diversity Pay?”, American Sociological Review, American Sociological Association. [asanet.org/sites/default/files/savvy/images/journals/docs/pdf/asr/Apr09ASRFeature.pdf](http://asanet.org/sites/default/files/savvy/images/journals/docs/pdf/asr/Apr09ASRFeature.pdf)
9. “Five Generations of Employees in Today’s Workforce,” The Center for Generational Kinetics. [genhq.com/five-generations-of-employees-in-todayworkforce/](http://genhq.com/five-generations-of-employees-in-todayworkforce/)
10. “Motivating Lawyers to Move from Activity to Impact: The Intersection of Professional Development and Diversity,” Law Practice Today. [americanbar.org/content/newsletter/publications/law\\_practice\\_today\\_home/lpt-archives/may13/motivating-lawyers-to-move-from-activity-to-impact.html](http://americanbar.org/content/newsletter/publications/law_practice_today_home/lpt-archives/may13/motivating-lawyers-to-move-from-activity-to-impact.html)



# Happy Anniversary - 3rd Quarter 2019

## June

Bonita Danser	38 years	Kathleen Whalen, CPA	9 years
Carolyn Berger	35 years	Gianna Stover	7 years
Patrick Smith	27 years	Patrick Stevens	6 years
Jessica Daugherty	16 years	Therese Garcia	2 years
Gabrielle Fischer	14 years	Linda Johnson	2 years
Terry Vickrey, CLM	11 years	Joanna Dunne	2 years

## July

Tony Malkani	21 years	Mariam Granados	5 years
John Fournier	19 years	Naomi Fang	4 years
Tony Mannara	10 years	Linda DiPasqua	1 year
Christie Sullivan, MBA, PHR	7 years	Miriam Fernandez	1 year
Donna Bustos	6 years	Zephraan Hamlin	1 year
Ann Thompson, CLM	6 years	Tye Waggoner	1 year
Cindy Bennett	5 years		

## August

Judith Finnegan, CLM	36 years	Hilary Martin	9 years
Maryann Aniversario	28 years	Diana Sobel	9 years
Steven Morris, CLM, SPHR	24 years	Dee Ramsey	7 years
Toni Burnside	22 years	Andrea Greil	5 years
Donna Tsuma, CLM	22 years	Kathleen Higuera	4 years
Debbie Randall	22 years	Indhira Gagnon, JD, SHRM-CP	3 years
Dorothy Rausa	18 years	Jia Liu Caruso	2 years
Laurali M. Kobel, CLM	17 years	Debi Sanders	2 years
W. James Van Dusen, CLM	16 years	Sarah Davidson	1 year



# Legal Lean Sigma® and Project Management Yellow Belt Certification Course



**Day One: Tuesday, September 17, 2019 from 7:30 a.m.–5 p.m.**

**Day Two: Wednesday, September 18, 2019 from 7:30 a.m.–4 p.m.**

**Boston Park Plaza, Boston, Massachusetts**

This two-day program is delivered by the Legal Lean Sigma Institute LLC. It includes lectures, exercises, simulations, videos, discussions, group and table-team work, and demonstrations covering key process improvement (PI) methodologies (such as Lean, Six Sigma, and the award-winning Legal WorkOut™), tools and concepts. It also introduces participants to project management (PM), explains how PI and PM are different, and demonstrates how they are employed together. We incorporate case studies from law firms and legal departments to enhance understanding and provide highly relevant examples from the law.

## **Objectives:**

- ◆ Explain the basic concepts and terminology associated with processes, process improvement and project management.
- ◆ Describe the key process improvement toolkits (Lean, Six Sigma), the main concepts behind each, and alternative approaches (Plan Do Check Act, Kaizens, Legal WorkOut®).
- ◆ Articulate the benefits of combining Lean Sigma and project management within a law firm/office or legal department.
- ◆ Identify the key stages of project management.
- ◆ Explore different approaches to project management.
- ◆ Outline the structure, roles, and responsibilities of a PI project team.
- ◆ Detail the structure, the common tools, and the key deliverables in the five phases (Define, Measure, Analyze, Improve, Control) of executing a process improvement project.
- ◆ Apply common tools used in process improvement and project management.
- ◆ State the benefits of efficiency and financial aspects of process improvement and project management, including budgeting, total cost of ownership, and scope changes.
- ◆ Make the connection between process improvement, Design Thinking, and innovation (Human Centered Design Thinking, Legal Lean Sigma® Design; Define, Measure, Analyze, Design Verify).
- ◆ Indicate what is required to move beyond carrying out process improvements opportunistically and make the case for carrying out process improvement systematically.
- ◆ Outline options for structuring for success and getting started.

**IMPORTANT:** There is an additional fee for this preconference workshop that includes both day one and day two:

- ◆ Member: \$1,799\* ◆ All Others: \$2,299\*



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# Intellectual Property Conference for Legal Management Professionals

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**September 26–27, 2019**

**The Capital Hilton**

**Washington, D.C.**

ALA's Intellectual Property Conference for Legal Management Professionals is the only IP-focused forum for administrators working in a legal practice setting. Held over two days, the forum features:

- Specialized solutions and education that address changes to the shifting IP landscape
- Seasoned experts and industry leaders at the forefront of IP law
- Opportunities to share ideas and explore trends in profitability, innovation, strategy and leadership
- Unique networking opportunities with peers and business partners in this niche field
- Continuing education credits

## **Exhibit and Sponsorship Opportunities**

ALA encourages its business partners to get involved at this high-impact, annual Intellectual Property event. Any business partner interested in IP sponsorships, please visit the [ALA Business Partner Portal](#) for more information.

*"The ALA Intellectual Property Conference is by far the legal industry's best opportunity to hear, share and learn what others in the intellectual property community are experiencing. The open discussions with peers, sharing of ideas, and problem-solving are extremely unique to the intellectual property group. Whether you are new to the practice of intellectual property or a seasoned veteran, you leave this conference enriched and rejuvenated."*

**Charly Doe MBA, CLM**, Executive Director, TraskBritt PC, Utah Chapter, Member Since 1996