

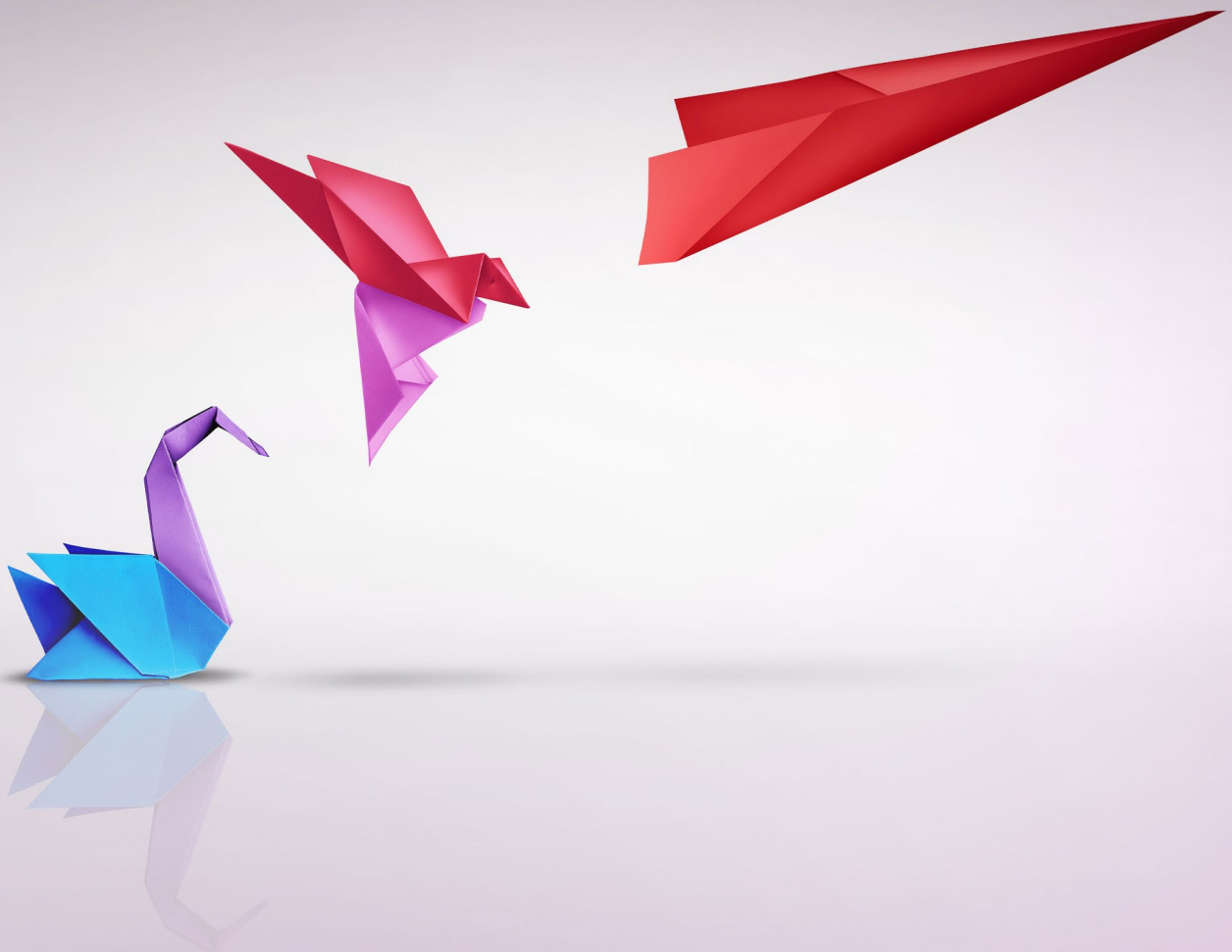
# LEGAL MANAGEMENT

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THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

## How to Usher in Change at Your Law Firm (and Not Scare Staff)

Reading the room and starting slowly can go a long way to making  
sure changes at your firm run smoothly.





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“ Legal CRM makes it easy to share files with clients securely, obtain legally binding e-signatures from clients and import documents once signed ... Firms can begin their relationship with new clients on the right foot through a prompt and seamless client intake process.”

## 5 Ways Legal CRM Can Help Your Law Firm Grow

As law firms grow, it can become incredibly time-consuming to market your firm, perform all the necessary tasks associated with client intake, maintain strong client relationships and complete enough billable hours.

These five tips can help your firm streamline processes and propel growth.

### 1. Engage more leads through automated marketing campaigns.

Converting leads into clients can require a lot of touchpoints. When done manually through individual emails, texts or phone calls, this process can be quite time-consuming.

When you automate lead-converting marketing campaigns, you can nurture leads more effectively and with greater results. Legal customer relationship management (CRM) systems help firms set up drip campaigns by:

- » Creating personalized email templates.
- » Scheduling follow-ups automatically.
- » Tracking engagement for leads throughout the process.

If you're worried that your messages will come across as "automated," remember that you can fully customize your messaging. Automated email sequences and text messages don't have to be impersonal.

You can use legal CRM to create personalized marketing email campaigns specific to each step in your client intake process. Email drip campaigns require an initial setup, and once complete, you can use them indefinitely with only minor adjustments, saving your firm countless hours of email outreach to potential leads.

## 2. Use customizable logic-based intake forms for greater efficiency.

A manual client intake process is time-consuming and error prone. It requires repetitive, tedious administrative work. Moreover, if a lead isn't the right fit for your firm, you may feel frustrated at the time spent on work that didn't generate revenue.

Logic-based intake forms help firms identify which leads may be a fit for their firm from the start. Through customizable and intelligent intake forms, law firms can pose questions that qualify leads based on the practice area or services required.

## 3. Reduce follow-up with clients.

Even after intake forms are submitted, you have more work to do before a lead officially becomes a client. This may mean phone calls, consultations and further meetings. Leading your potential client through these meetings and getting them to sign on the dotted line requires good communication and follow-up. After all, you're busy, but so are your clients.

Legal CRM can reduce your workload by sending out automated messages to schedule meetings, remind potential clients about upcoming meetings, send follow-up paperwork and more.

## 4. Assemble documents automatically and share securely through text or email.

Document management is a critical part of the client intake process, but it has historically been a hands-on process. Whether it's document assembly or reminding clients to return a signed document, even minor issues can delay the intake process and leave your client with a less-than-perfect first impression.

With a legal CRM system, law firms can automate document assembly to streamline client intake workflows by pulling from client profiles within the CRM.

Legal CRM makes it easy to share files with clients securely, obtain legally binding e-signatures from clients and import documents once signed. With text message automation, you can share documents securely and send automated follow-ups, reminders, e-signature requests and appointment confirmations. Firms can begin their relationship with new clients on the right foot through a prompt and seamless client intake process.

## 5. Maximize your productivity and efficiency with integrations.

When your systems don't integrate, you spend more time switching between systems, transferring data and triple-checking for errors.



In addition to the relationships you build with your clients, an integrated CRM saves your legal team significant time throughout the week with streamlined workflows that maximize efficiency.

Rather than constantly switching between different platforms and devices, integrated legal CRM provides a single, user-friendly platform where a law firm can manage client intake, schedule appointments and share files without missing a beat.

## GROW YOUR LAW FIRM WITH LEGAL CRM

Growing your client base doesn't have to be a catch-22. It is possible to bring in more clients in less time without sacrificing billable hours for your current clients.

With a legal CRM system, your law firm can spend more time providing expert legal services and less time on marketing and lead conversion. And rather than sacrificing your marketing efforts or the quality of your client relationship management, legal CRM simplifies the process to enable effective marketing and client communication with tools specifically built for law firms.

### ABOUT THE AUTHOR

**Bruce Policky** is the Director of Enterprise Sales and Success at Software Technology LLC, the maker of Tabs3 Software. He is responsible for managing all marketing, sales and training activities. Over his 30+ years with the company, he has helped clients and consultants in the legal software industry meet their billing, accounting, practice management and electronic payment needs.

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**MICHAEL HINKLE**  
 Founder  
 JBI

# Building Trust with Clients Is All About Great Communication

**A law firm’s ability to communicate well with its clients is a critical skill that is sometimes overlooked or undervalued by busy people in the profession, but being busy shouldn’t be an excuse. Whether an administrator or an attorney is emailing an update or sending a bill, the client’s feeling about the firm — and their opinion of it that they will share with others — will be shaped primarily by the firm’s communication skills.**

Clients in any industry want to know that they are receiving the best effort from everyone who’s involved in providing the services they’ve purchased. They want as much clarity, consistency and certainty as possible. Those who manage the business side of legal firms, as well as firm administrators and lawyers, should be aware of the importance of communication, how it impacts clients and how it affects future business for the firm.

In law firms and success-driven companies in all industries where communication practices have been lacking, it’s time to focus on providing training for the internal staff and even for lawyers. Management and all individuals dealing with clients need to realize that limitations or lapses they have in communicating can be corrected, leading to a positive experience for their clients and a future filled with referrals for the firm.

## CLIENTS DON’T EXPECT PERFECTION, BUT THEY DO EXPECT TRANSPARENCY

Clients in any industry — those who are reasonable, anyway — do not expect companies to get everything 100% correct 100% of the time. But they might find it unacceptable when they are led to believe something is headed in a positive direction and then are hit with an unwelcome surprise.

In that scenario, there was likely a communication gap — the firm failed to communicate for when the situation was changing, and/or the full scale of the problem wasn’t explained properly to the client. To bridge that gap, communicating

“  
 In my years in sales working with various clients, I have maintained one simple, consistent way in approaching these relationships: I am always transparent with my clients.”

consistently and with more transparency, clarity and detail could have better prepared the client for negative news and informed them of a solution.

Setting the client's expectations from the outset of the relationship is critical. You've heard of the over-promise/under-deliver concept, and that's where many companies get in trouble, with a failure to properly communicate exacerbating the problem. In my years in sales working with various clients, I have maintained one simple, consistent way in approaching these relationships: I am always transparent with my clients. I neither over-promise nor under-promise, telling them exactly what the challenges are and the potential solutions that can be reached.

This approach can be used to not only maintain and strengthen client relationships — even when problems arise — but to increase referrals. Clients whom you kept informed and provided solutions for are far more likely to refer your firm to friends and associates.

If I tell them I will have something back to them tomorrow morning, they fully expect it tomorrow morning. If it is going to take longer than I initially promised, I call them with an update long before they have a chance to reach out to me.

## BE SOLUTION-FOCUSED

Remember this: A client is never interested in what you know about your business until they fully understand how much you care about them and their business. Communication practices like this will result in people choosing to work with you exclusively because of that approach to your business.

I always ask open-ended questions about what clients need so that I do not overlook something that could have been an easy fix had I asked the right question. Never expect a client to fully understand the internal workings of your organization. Instead, make sure what they are asking for is truly what they need to fix the problem they perceive that they have.

Trying to be an expert in everything and not fully making sure your client understands the solution only creates an additional barrier to success. They have no way of understanding how your solution helps them and is not just self-serving your organization's needs.



## BE PROACTIVE

It is always better when dealing with clients to be proactive in the dissemination of information as opposed to reactive. If your client must contact you about a work product they are expecting from you, their first thought will be, "Why am I doing the follow-up? Is this not why I am paying your firm?" Additionally, the client is wondering if the company really cares about them. When you place a client in this type of self-realization, it forces them to consider whether they picked the correct service provider for their needs.

The next time you receive a call from a client, you have two ways of approaching any potential solution they may be seeking from you. One possible conclusion they can draw is: "These people get me and what my needs are, and I am in good hands." Or their thinking could go something like this: "Every time I call them, they seem to not be taking my business seriously, and if I need an update, it's up to me to call them."

The last thing you will hear from an unhappy client before they take their business elsewhere is, "I always have to call you." Let's make it our mission in this hectic world to ensure that conversation never happens.

### ABOUT THE AUTHORS

**Michael Hinkle**, author of *Treasure Hunt: A Common-Sense Approach To Building A Successful Sales Career*, is the Founder of JBI, a Los Angeles-based sales consulting and coaching business. His three decades in sales have included 20-plus years with a Fortune 500 company, where he rose to become a vice president while continuing to manage a productive sales pipeline and foster client relationships.

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*Senior Security Analyst*

**MATT SMITH**

*Senior Systems Engineer  
Innovative Computing Systems, Inc.*

“Risk is prevalent throughout our business and personal lives. Your personal financial well-being can be significantly disrupted by having your credit card numbers stolen, and your business can be crippled by a user accidentally letting loose a ransomware attack by clicking on a link that appeared to be emailed from a trusted source.”

## 12 Comprehensive Steps to Mitigating Legal Technology Risks

**Risk is prevalent throughout our business and personal lives. Your personal financial well-being can be significantly disrupted by having your credit card numbers stolen, and your business can be crippled by a user accidentally letting loose a ransomware attack by clicking on a link that appeared to be emailed from a trusted source.**

Law firms, like any other business, grapple with the ever-present threat of technology-related risks. Every firm has assets, encompassing data, software, systems and users, and each has unique vulnerabilities. Threats, especially from bad actors, compound the risk.

In 2024, we know that risk mitigation involves modifying and reducing risk when it is not possible to eliminate it, just like wearing a seat belt in a car. Risk transfer, risk avoidance and risk acceptance contribute to a holistic risk management strategy. Consider the following elements for your risk mitigation plan in the year ahead.

### 1. Asset Inventory

A complete asset inventory is foundational to risk mitigation at any law firm. Identifying and understanding assets, from workstations to servers and applications, is crucial. Knowing where critical data resides and implementing security controls accordingly ensures comprehensive protection. The success of other security controls is dependent on an accurate asset inventory. Inadequate asset inventory can lead to a false sense of security and increase vulnerability.

### 2. Life Cycle Management

Managing the life cycle of your firm’s hardware and software assets, from planning to decommissioning, is imperative. Regular upgrades and adherence to manufacturer guidelines prevent end-of-life vulnerabilities. Life cycle management minimizes technical debt, ensuring cost-effective and secure operations.

### 3. Patch Management and Vulnerability Management

Continuous patch management is essential for closing vulnerabilities within applications and safeguarding systems. Vulnerability management complements patching by identifying missed updates, zero-day vulnerabilities and software updates not covered by patching, ensuring overall network security. The cost of regular patching and vulnerability management at your firm is significantly lower than navigating the aftermath when your systems are compromised.

### 4. Ransomware and Reputation Management

Ransomware threats have evolved beyond encrypting data. Attackers now target brand and reputation, adding a new dimension to the risks. Strong patching and vulnerability management controls help to prevent lateral movement by attackers, protecting client data and your firm's reputation.

### 5. Identity and Access Management

User credentials are a common target for attackers. Identity and access management, including strong password policies and multifactor authentication, are crucial. The principle of least privilege ensures users have access only to necessary resources, and inactive accounts should be regularly reviewed and disabled.

### 6. Network Segmentation

Network segmentation, particularly isolating guest networks from internal resources, enhances security. Limiting access between internal resources further mitigates risks. Prohibiting Internet of Things (i.e., the cloud) and personal devices on your firm's main network reduces potential vulnerabilities and points of entry.

### 7. Mobile Device Management and Conditional Access

Mobile device management and conditional access policies provide additional layers of security at your firm. Managing and controlling access based on device compliance enhances overall risk mitigation.

### 8. Incident Response Plan

An effective incident response plan that is regularly practiced through tabletop exercises is essential for law firms. A structured plan can minimize the impact of security incidents and facilitate a swift and coordinated response. It's important

to regularly practice and update your firm's incident response plan to ensure its effectiveness and that all employees involved know their roles.

### 9. Employee Training and Awareness

As threats to data security are constantly changing, ongoing cybersecurity training and awareness programs for law firm staff are a necessity. Employees have a significant role in mitigating risks and preventing security incidents through adherence to best practices and vigilant behavior. Cultivate a cybersecurity-conscious culture within your firm.

### 10. Regulatory Compliance and Legal Obligations

Be aware of the relevant laws that affect law firms today, such as the European General Data Protection Regulation, California Consumer Privacy Act, the ABA's Model Rules of Professional Conduct and state privacy laws. Compliance with these regulations is essential for mitigating risks, avoiding legal repercussions and building client confidence by proactively protecting personal data.

### 11. Third-Party Risk Management

Know there are risks associated with third-party vendors and service providers in the legal industry. Conduct thorough due diligence when engaging third parties and implementing contractual safeguards to protect sensitive data. Complete vendor risk assessments to ensure the vendor meets your requirements prior to introducing new products to the environment.



## 12. Continuous Monitoring and Threat Intelligence

Continuous monitoring tools and threat intelligence solutions can help firms detect and respond to emerging cyberthreats in real time, lessening damage to data and reputation.

In the complex realm of legal technology, mitigating risks demands a multifaceted strategy. The interconnected nature of risk components necessitates a comprehensive approach. Law firms must stay proactive, incorporating asset management, regular life cycle updates, robust patching and vigilant identity and access controls.

If the steps needed to mitigate risk, ensure client confidentiality and protect the firm's reputation seem daunting, consider engaging a third-party expert to guide you

through the process. By adopting these strategies, your firm can navigate the digital landscape with resilience and confidence, safeguarding sensitive information and maintaining the trust of clients and stakeholders.

### ABOUT THE AUTHORS

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PHILLIP M. PERRY  
Freelance Business Writer

“Whenever change occurs, the legal administrator has to be attentive to how people are thinking, feeling and behaving in response. People will fight change because they feel threatened and that are somehow losing out.”

## How to Usher in Change at your Law Firm (and Not Scare Staff)

*Reading the room and starting slowly can go a long way to making sure changes at your firm run smoothly.*

**Artificial intelligence. Hybrid work arrangements. Upgrades to software programs. Innovative recruiting strategies. Shifts in what's expected in the workplace and for career development.**

Changes like these are commonplace and on an accelerated path at law firms. And while new ways of doing business may benefit law firm operations, getting the stamp of approval from the powers-that-be can feel like slogging through molasses. Lawyers, after all, have a reputation for resisting change.

Attorneys are not alone in looking askance at new initiatives. “Most people hate change,” says Elise Powers, Chief Executive Officer of Elevue Consulting. “Even if a new way of doing something is an improvement, fear of the unknown keeps us wanting to preserve the status quo. And it just requires more energy for us to pivot when things don’t go perfectly the first time.”

Maybe a risk-averse mindset is common to all humanity, but it seems to be doubly so in the legal profession. That makes sense, given the background of attorneys. “Take a step back and understand where lawyers are coming from,” says Daniel J. McCormack, CLM, MBA, ACC, Chief Executive Officer of Dan McCormack & Associates LLC, and a member of ALA’s Professional Development Advisory Committee. “Their entire education and career have been an in-depth progression based on historic facts. They have to look at everything and verify by double and triple checking. And that’s how they make all their decisions for their clients.”

It follows, then, that anyone who walks in and says, “I want to change this,” needs to have a cogent argument lined up.

“I’m a fan of trialing out something, of introducing a major change to a small group of attorneys or professional staff in the form of a pilot program that lasts perhaps two weeks or a month. The idea is to get their input on how they felt about the process, how it went, then tweak it to make improvements before rolling it out firmwide.”

Given their need to maximize return on their time, attorneys can also be particularly wary of any new initiative that threatens to commandeer their daily schedule. This is often the case, for example, with new data processing software.

“A change in technology can require more time and energy up front to do tasks because of the need to learn new routines,” says Powers. “Even if attorneys recognize the improvements inherent in a new way of doing things, many will resist a learning process that can be a bit cumbersome or burdensome.”

The reliance on precedent that is common to the legal profession can also contribute to an elevation of the value of traditional procedures, pointed out Powers. “Attorneys rely on what has been decided in the past as a guide for the future. They rely on this mindset for their practice to be successful.”

The partnership structure at many firms can also contribute to change resistance. Requiring more than one person to sign off on an operational modification can slow down the approval process. “To get anyone to agree on anything these days is a Herculean task,” says Powers. “Many times, it’s just easier to maintain the inertia of whatever you have been doing rather than to rally the troops around something new.”

Perhaps the most important reason of all, however, is a tendency for lawyers to hold back from any modifications in firm operations unless they are convinced of a clear client benefit. “When you think about what attorneys are paid to do, it is to protect their clients from anything that can go wrong,” says Powers. “As a result, attorneys are sensitive to the potential risk that can go along with any proposed change.”

Indeed, there is also the possibility that visible modifications in a firm’s operating procedures alarm the client base. “What if clients push back on a change when it is introduced?” says Powers. “Attorneys will resist anything that may rock the boat when it comes to client perceptions.” This concern will be all the greater when individual attorneys have little control over how a proposed change will roll out firmwide.

## THE NEED FOR EMOTIONAL INTELLIGENCE

One thing is clear: There’s more change ahead for the legal industry. Artificial intelligence, in particular, may well bring about new ways of conducting research, predicting case outcomes and even suggesting personalized services based on client histories.

So how can a legal management professional develop the skills required to move the needle when conditions call for new ways of doing business? The first step is to understand the emotional environment that surrounds the change dynamic.

“Whenever change occurs, the legal administrator has to be attentive to how people are thinking, feeling and behaving in response,” says McCormack. “People will fight change because they feel threatened and that they are somehow losing out.”

Legal management professionals must develop the skills to convert the change scenario from win-lose to win-win. “By listening to people, validating their concerns, explaining the new process, and speaking to the available resources and how they themselves have helped the organization adjust to change in the past, they will start to see the positive outcome of the proposed change,” says McCormack.








This kind of participatory dynamic allows people to invest in the change by providing feedback on what works and what doesn't. A trial program can also encourage pilot group participants to be ambassadors for the change, validating and normalizing it for their colleagues by talking about it as a peer. "People like to feel they have contributed," says Powers. "That feeling can help facilitate acceptance of a new program."


Over the long term, legal management professionals can cultivate a law firm with forward-looking change culture by developing the emotional intelligence required to introduce change. "You need to be on your toes in creating a collaborative, open environment that will help soften the message when change happens," says McCormack. "There's a constant need for clear communication, and for consistently delivering a message in line with the overriding vision of client service."

 **Continue the Change Management Conversation**

Why is change such a tough thing to manage in firms? We delve into that question in a recent episode of *Legal Management Talk*. Catherine Alman MacDonagh, JD, the Founder of Legal Lean Sigma Institute and a member of ALA's Professional Development Advisory Committee, discusses steps for managing change, the importance of creating small change "wins," how to avoid change burnout and more. Tune in wherever you listen to your podcasts or watch us (and subscribe!) on YouTube.

**ABOUT THE AUTHOR**

**Phillip M. Perry** is an award-winning business journalist with over 20 years of experience under his belt. A three-time recipient of the American Bar Association's Edge Award for editorial achievement, Perry freelances out of his New York City office. His byline has appeared over 3,000 times in the nation's business press.

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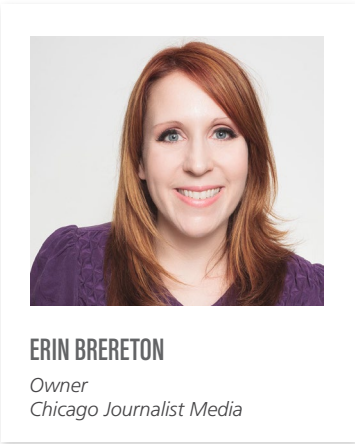
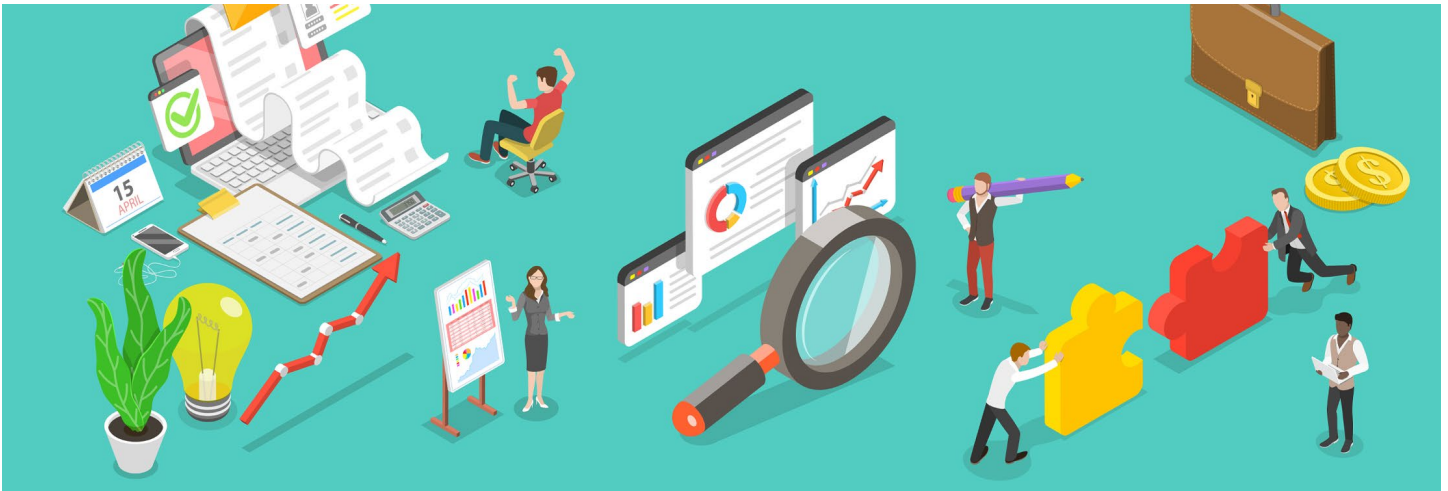
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# Onboarding Goes Virtual

*Virtual onboarding has become more frequent in recent years — find out how to make the process more personal.*

**On Friday, March 19, 2020 — one business day before Danielle E. Cain was scheduled to begin working as an Associate at Spiros Law, P.C.’s Champaign, Illinois, office — the governor announced a statewide stay-at-home order to reduce the spread of COVID-19, which took effect the following day.**

Without a workplace to report to on Monday, the personal injury firm delayed Cain’s start date by roughly three weeks to determine how employees would be able to work remotely — and execute their typical onboarding steps.

“It just really required intentionality — making sure I had access to everything,” says Cain, who is now a Partner at the firm. “We were extremely intentional about training, meeting with people via Zoom; we’re still very deliberate about those things today.”

Before 2020, onboarding new hires virtually wasn’t the norm, according to Jared Correia, a former practicing attorney and Founder and Chief Executive Officer of Red Cave Law Firm Consulting — and the industry’s approach to onboarding in the office, he says, wasn’t always ideal.

“Though there were some law firms using remote employees prior to the pandemic, it was a small number,” Correia says. “Attorneys have always valued in-person work and collegiality. Most law firms operate on a ‘baptism by fire’ protocol, where people are just thrown in and expected to learn on the fly, including hires with little experience.”

With all but 11% of law firms now supporting some type of hybrid work arrangement, according to a CBRE survey, virtual onboarding is presumably becoming a more frequent occurrence.

“Regular feedback loops are effective, whether it’s daily standup meetings or access to asynchronous communication tools, like Slack. And hypothetical training exercises, fact patterns related to real work experiences, can help to access a new hire’s ability.”

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**“If this is a new graduate or somebody who’s coming to your firm or department with 20 years of experience, a mentorship is another piece that can be so critical to their integration. It allows for one-on-one interaction and a better understanding of the overall culture.”**

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While getting newcomers up-to-speed — and ensuring they feel like part of the team — can be a nuanced endeavor when they’re standing in front of you, paying close attention to elements such as the instructional materials and interaction you provide can help increase the likelihood you’ll be able to successfully manage the onboarding process online.

## **TECH ORIENTATION CONSIDERATIONS**

Implementing remote onboarding capabilities doesn’t necessarily have to involve a large expense.

Firms and legal departments are often able to use existing technology to induct employees who aren’t physically in the workplace, according to Joleena Louis — whose New York-based divorce and family law firm, Joleena Louis Law, has utilized virtual part-time paralegals and assistants since 2018.

Cloud-based software platforms, for example, can let employees easily access law firm or department resources from different locations.

“Depending on how they are currently operating, they may need to invest in new technology,” Louis says. “But if you already run part of your business virtually, it’s likely you already have what you need.”

Spiros Law outfits new employees who will be hybrid or fully remote with the type of laptop and phone firm members use in the office, as well as an extra computer screen, so everyone is using the same compatible system components.

To allow recent hires to absorb all the information that’s shared during the onboarding process, the firm spreads it out over about six weeks, Cain says.

On their first day, new employees learn how to use the case management system. Within their first week, they’ll attend one of the firm’s all-attorney or all-assistant meetings via a videoconferencing platform and be introduced to colleagues.

The firm also, according to Cain, tries to identify opportunities for new attorneys to electronically sit in on events such as a mediation or arbitration.

“We’re usually texting at the same time — [asking], ‘Do you have any questions? Did you think of anything I didn’t ask?’” she says. “The advances in Zoom since COVID have really allowed for including the shadowing and observations from our remote employees.”

## **MAXIMIZING THE IMPACT OF EDUCATIONAL CONTENT**

To adequately prepare new hires to perform work, Louis documents the processes with a screen recording tool, essentially creating on-demand tutorials.

“For every task that needs to be completed, I have a step-by-step process, so it is easy to show new hires how to do it,” she says. “I use Loom to record [on-screen] what needs to be done and talk through each step. If new processes are developed, you can even have the employees record and explain the process for any future employees.”

Various preparations can help new employees tap into the organization’s institutional knowledge when they start. Cain and another Spiros Law partner, for instance, created a handbook for the firm’s case management system, which they’ve continued to update with help from an office manager.

“You can look up pretty much anything you have a question [about] because we’ve been adding things to it that have come up,” Cain says. “It’s constantly evolving and expanding [because] we’ve [said], ‘Oh, you know what? So-and-so doesn’t know how to do this. We probably didn’t onboard that.’”

The firm has also developed explanatory sessions to address specific needs.

“As time has evolved, we’ve added more trainings on different things we hadn’t really thought of in the beginning,” Cain says. “It’s things as simple as acronyms that the office uses.”

Other technological tools and approaches can help organizations confirm remote and hybrid hires fully comprehend the preferred operational methods.

“Regular feedback loops are effective, whether it’s daily standup meetings or access to asynchronous communication tools, like Slack,” Correia says. “And hypothetical training exercises, fact patterns related to real work experiences, can help to access a new hire’s ability.”

## GETTING ACQUAINTED

With multiple teams frequently involved, onboarding can potentially be a complicated undertaking, according to Jamy Sullivan, JD, Executive Director at Robert Half — particularly if all related communication occurs by computer or phone.

“The piece of it that maybe doesn’t translate as well is that human connection,” Sullivan says. “Because you’re going to miss out on that water cooler talk and getting to know each other personally.”

In addition to having dedicated team members, such as a help desk specialist, available to handle onboarding’s technical aspects, she suggests employers ensure, by the time new employees start, a meeting has been scheduled — such as a casual chat over coffee — with their coworkers to facilitate everyone sharing information about their role, themselves and how they’ll work together.

“[You’re] setting those meetings up just to get that personal knowledge of who this person is,” Sullivan says. “That starts to evolve into understanding the company culture — and that dynamic of what you would feel if you were in the office doing your onboarding.”

She also recommends pairing new employees with a mentor, something she says law firms tend to do more often than legal departments.

“If this is a new graduate or somebody who’s coming to your firm or department with 20 years of experience, a mentorship is another piece that can be so critical to their integration,” Sullivan says. “It allows for one-on-one interaction and a better understanding of the overall culture. That sets an individual up for success — but [it’s] also a retention factor. Whether it’s remote or in-person, that should still be part of the process.”

Firms and legal departments can encourage new off-site employees to participate in social events. When the Spiros Law location in Champaign hosts a happy hour, Cain says, the gathering is broadcast to conference rooms through Zoom, and the firm tries to loop external employees in.

“Our remote people and all the offices hop on,” she says. “That way we’re all together, even though we’re not. We try to plan things like that to make sure we’re getting together. There are events that are in-person, where our remote people will come; [the assistants who live in] North Carolina and Washington don’t generally — but they’re always invited.”

## FAVORING SUBSTANCE OVER PACE

During onboarding, the focus can often be on getting new employees up-to-speed on the organization’s procedures and work assignments as quickly as possible.

Taking the time, however, to outline performance expectations and any associated milestones — such as what you expect to be accomplished after 30 and 60 days — and asking new employees on a weekly basis what’s working or may be lacking could strengthen your overall training efforts, according to Sullivan.

“This gives you, as the employer, an opportunity to make adjustments in your onboarding program — not only for that employee, but for future employees you’re going to be onboarding remotely,” she says.

Although individual hires’ specific needs will likely dictate some aspects of their onboarding, having a basic structure in place gives law firms and departments a roadmap they can customize.

Conveying how the onboarding process is going to look — including who will be involved — to employees before they log on to begin it, according to Sullivan, can also help make the experience easier.

“A lot of people may wait until the first day to start talking about that,” she says. “But [after] they’ve given their notice to their former employer, that’s a good two weeks. They probably have anxiety about their onboarding [being] remote. I describe this as putting your communication in overdrive so this new employee feels hand-held. If you can do that in advance — and script out what those expectations are — you’re off to a really good start.”

### ABOUT THE AUTHOR

**Erin Brereton** is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

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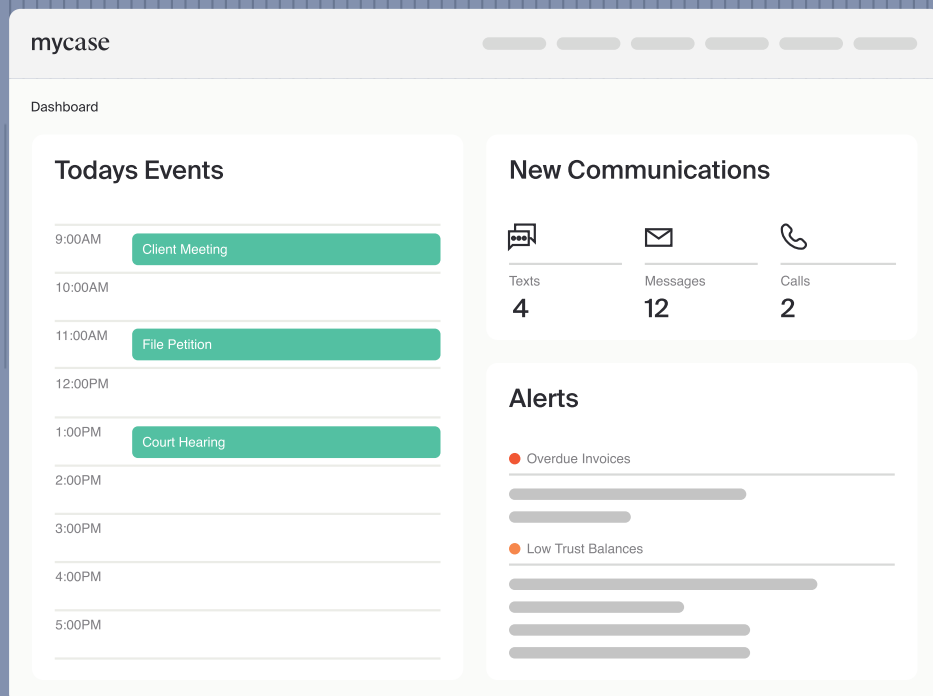
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“Chatbots and AI can enhance the customer experience, but many people prefer the warmth, understanding and problem-solving capacity of a friendly human being on the other end of the phone, particularly when their call is urgent or sensitive.”

## Maintaining the Human Connection in Customer Service

**As the saying goes, you never get a second chance to make a first impression. Your firm may be expert at its practice, have an impressive office and website, and retain attorneys that are heavily sought after, but if they aren't available for clients when today's "always on" client reaches out, all those efforts will be wasted.**

While there are several ways for firms to communicate with clients — social media, email, mail, live chat — one of the trends we've seen post-COVID across industries is a strong desire from clients to talk to a real human on the phone. In the legal profession, this can be true to an even greater degree since these calls can often involve emotional or complex issues.

We recently found that 62% of people are spending longer on the phone with businesses than three years ago, and that 76% of customers cite a company not putting their phone number on their website as a major source of irritation. Even if they never use it, clients know they have a way of getting in touch and being able to talk to someone. Further, not seeing a phone number can understandably create trepidation about your brand.

Additionally, almost half of respondents said they would go elsewhere following a poor call, while just over 40% would call back and ask to speak to someone else, and over a third would make the effort to complain to the business.

But the Great Resignation and talent drought that succeeded COVID has also fueled staffing shortages that do not lend themselves to having someone available to pick up the phone any time someone wants to talk. Further, the likelihood of a firm being able to commit an attorney, paralegal or any full-time staffer to this "on call" role does not make good business sense.

We recently conducted our annual "mystery caller" research that showed a mix of service performance for the firms we surveyed in terms of the warmth of the greeting, their

helpfulness and their call handling quality throughout the call. At the time, around three-quarters of the firms called defaulted to voicemail or had the phone ring until the caller was disconnected. And when it came to the speed of calls being answered, the best-performing firms answered their calls in an average of one ring or five seconds, while the worst performing answered in an average of six rings or 36 seconds — the longest wait time from any industry.

When you're looking for representation, or when you're being represented, a call to nowhere can be a major turnoff or frustration. While live chat can be incredibly useful in fielding inquiries through a combination of artificial intelligence (AI) and human support, a client may be looking for further reassurance or need to discuss something more complicated than a chatbot can field.

From working with firms, we recognized there was a unique need in the legal industry given the sector's language and terminology. Industries like law have jargon and references that require quite a bit of mastery to be of assistance to clients when an attorney or paralegal are not available to talk. The service also further allowed firms to keep both their lawyers and paralegals focused on the work at hand — providing them with the comfort of knowing the people answering the phone will keep the conversations and work moving in the desired direction.

Beyond ongoing client service, another area we've seen firms struggle with is following up on and fielding leads. Studies


have found a pick-up rate of 50% to 80% when a firm calls a prospect back within five minutes. A person who has just submitted a contact form may not expect an answer from a real person, but imagine their surprise when an inquiry gets a call back within seconds!

As the world becomes more digital, businesses must remember the value of human connection. Chatbots and AI can enhance the customer experience, but many people prefer the warmth, understanding and problem-solving capacity of a friendly human being on the other end of the phone, particularly when their call is urgent or sensitive.

Research shows that brands with superior customer experience bring in five to seven times more revenue than those that lag in customer experience. And while the prospect of doing it well can be daunting, a little bit of effort can go a long way in driving business.

**ABOUT THE AUTHORS**

**Eric Schurke** is Vice President, North America Group for Money Penny and VoiceNation. For more than 20 years, VoiceNation has specialized in custom-scripted call answering, with bilingual receptionists available to take calls 24 hours a day. VoiceNation is part of Money Penny, a 24/7 provider of personalized answering services, live chat and customer contact solutions.

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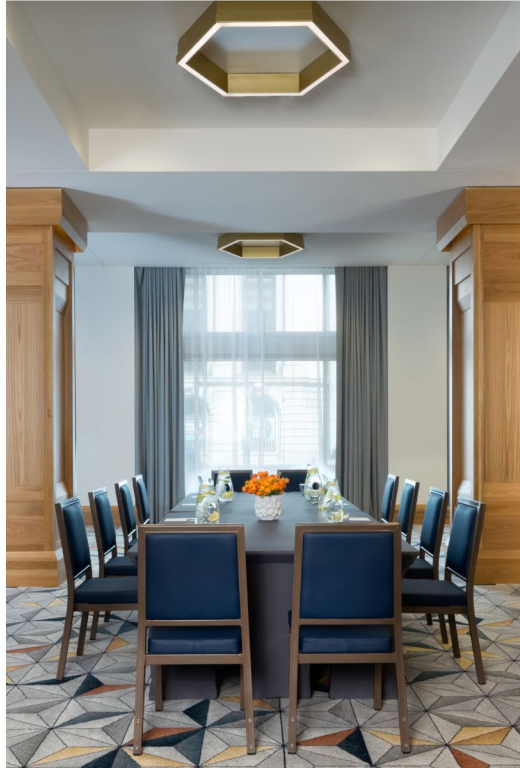
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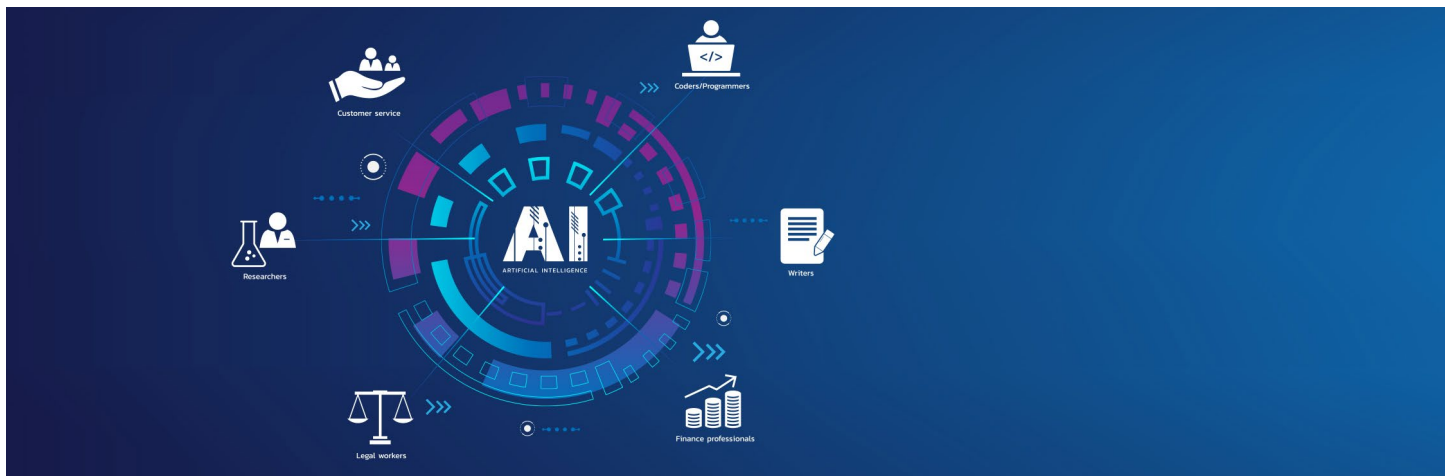
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# How AI Will Transform Your Law Firm's Financial Workflows

**By now you are tired of hearing that artificial intelligence (AI) is going to transform every part of your life. You dread the day you have to consult ChatGPT to brush your teeth. You may also be freaked out about AI hallucinations, bias and copyright infringement. But the facts remain that AI is not going away, and in the right circumstances, it is incredibly useful.**

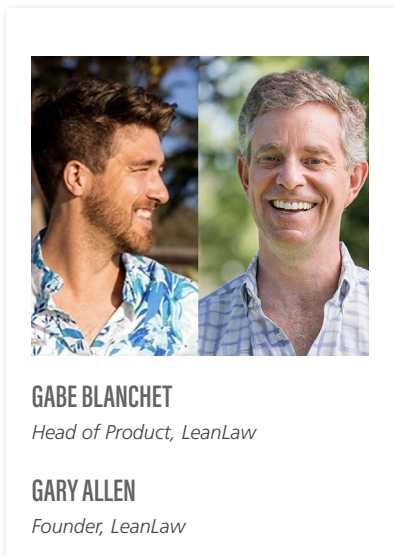
The analysis of law firm finances is one area where AI shines. Finance applications play to AI's strengths as AI is good at sifting through large amounts of data in a short amount of time and analyzing trends. It's good — and will get better — at checking data inputs and analysis, reducing the risk of error. AI excels at comparing data to benchmarks and detecting fraud. With AI handling the data preparation and number-crunching, humans can focus on strategic analysis.

To illustrate the power of AI in law firm finance, let's imagine your firm's managing partner bursts into your office and demands you produce three insightful financial reports and have them on her desk in one hour. Without AI, you are probably sunk. But let's see if AI can save the day.

## LEVERAGING AI FOR FINANCIAL ANALYSIS

You decide the reports you want to present are a revenue analysis by practice area, an expense management review and a financial forecast for the upcoming fiscal year. Normally, these reports are beasts that require gathering data from multiple sources, painstaking analysis and sophisticated interpretation. You are used to doing all of them, but today there is no time. You'll have to see what AI can do.

Let's assume you are going to use ChatGPT, the best known of the current large language model (LLM) platforms. It also has versions that are secure and do not train on user data. The way you proceed is to feed ChatGPT the firm's standard, existing firm financial reports as the data source, along with a prompt of what you want ChatGPT to do.



“The analysis of law firm finances is one area where AI shines. Finance applications play to AI's strengths as AI is good at sifting through large amounts of data in a short amount of time and analyzing trends.”

In the paragraphs below, we describe useful prompts and the results you would expect to see. Because of the space limitations of this article, we are only able to offer a short description of what AI can do. But of course, seeing is believing! Later in the article, you'll have an opportunity to try it safely for yourself.

## 1. Revenue Analysis by Practice Area

**ChatGPT Prompt:** "Given the firm's financial reports for the last two years, categorize and analyze days to bill, billed time and collected revenue by practice area. Identify trends, highlight growth areas and pinpoint underperforming segments. Suggest actionable strategies for revenue optimization, gaps between billing and collection and other business improvements."

You are amazed when ChatGPT produces the requested report. The AI system can indeed analyze which practice areas are growing and which are underperforming, given a reasonable data set. This gives the managing partner insights about where to focus the firm's resources along with what areas need to be shored up or eliminated.

## 2. Expense Management Review

**ChatGPT Prompt:** "Analyze the firm's detailed expense report for the previous fiscal year. Break down expenses by category and department, identify trends and areas of high expenditure, and recommend cost-saving strategies without compromising service quality."

Once again, you are excited the AI system can organize the data, compare it to benchmarks, and identify opportunities for saving money. This has been on your list to do forever, but when were you going to find the time?

## 3. Financial Forecasting

**ChatGPT Prompt:** "Using the financial performance data from the past three years, forecast the firm's financial outlook for the next year. Consider current market trends, growth in practice areas, and planned investments. Highlight potential risks and strategic opportunities."

Ugh, forecasting is hard, right? Fortunately, AI's predictive capabilities can make this job much easier, and potentially do it in a more objective way than you or the firm partners ever could. This prompt puts strategic insight in your hands more easily and faster than you ever could before.

## HOW TO ADDRESS KNOWN AI PROBLEMS

Of course, AI is far from perfect and has some known and troubling issues. The question is how to navigate these concerns

without losing the benefit of the technology. One issue is confidentiality. Some AI tools are secure, like ChatGPT Enterprise or Teams — they ensure your sensitive financial data is processed safely, and is not used to train future iterations of the AI model.

A law firm cannot have it any other way. Another concern is "hallucination," the tendency of current AI models to "make things up." The important thing here is to ask ChatGPT to do things that are verifiable, and to check the AI system's work. Just as lawyers need to check any research done by an AI system, financial professionals need to do the same.

## CHECK IT OUT

The point is, ChatGPT is very versatile and can do all kinds of useful tasks from writing to drawing, from coding to financial analysis. To get the most value out of it at its current stage of development, you have to get good at writing prompts. You can find blog posts like this one on the subject, or ChatGPT will happily offer you general advice.

Of all the things AI systems can do, financial data collection and analysis are right in the sweet spot of AI's capabilities. It's not perfect and may never be. But there is little doubt AI can be useful now to the finance professional and will be indispensable in the future. There is no replacement for getting to know AI's capabilities and getting used to using the tools in a safe and secure manner.

### ABOUT THE AUTHORS

**Gabe Blanchet** is an entrepreneur and Head of Product at LeanLaw, a timekeeping, invoicing and reporting software company. Since receiving a degree from MIT, Gabe has founded multiple companies, developing useful products that solve important needs. He has built solutions for consumers, SMBs, and enterprises. His passion is talking to customers to generate new ideas then building teams to execute on those solutions.

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**Gary G. Allen, Esq.**, is a Founder at LeanLaw, a legal timekeeping, invoicing and reporting software company, as well as a partner at Givens Pursley LLP where he practiced law for 30+ years before retiring in 2024. He was only two years out of Stanford Law School when the firm he was working for imploded. It happened again at a different firm a few years later. He was left without a job with a six-month-old baby to feed. Those experiences created a passion in Allen to help law firms be better businesses, with efficient operations, streamlined financial management and a laser focus on profitability.

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FRANK LONG

Senior Manager, Content and Communications  
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## Small, Medium and Large Law Firms: Which Size is Right for You?

**Jobs are like relationships. Everyone wonders about the choices other people make. If you're feeling like the law firm you've chosen is too big, too small or too in-between, maybe it's time to ask whether a different size practice would be a better fit.**

This article maps out the pros and cons of large, midsize and small firms to help you zero in on the right environment for you.

### THE BIG DEAL ABOUT BIG LAW

If you want to work on the world stage and reach the salary range's top percentile, big law firms — also known as Big Law — are where you want to be.

More than upmarket furniture and high-rise views, Big Law firms are known for having extensive resources, a deep bench of talent and name recognition. Other important perks include:

- » Top incomes
- » Challenging practice opportunities
- » Smart, capable colleagues and mentors
- » Industry prestige
- » High-value networking and connections

“Those who fit best at midsize firms want to do a little bit of everything among a wide variety of specialties. A midsize firm can offer a good way to build those skills, which is particularly good during early-career years.”





Look like the stuff of dream jobs? Maybe. But working at the high end of the profession has tradeoffs that include:

- » Long hours
- » High pressure, competitive culture
- » Strict dress code
- » High billable quotas
- » Challenging work-life balance

Some big firms may also have a confusing reporting structure, so support staff may find themselves working for multiple partners who rarely talk to each other.

## Go Big?

High-end casework constitutes the bulk of what large firms handle. If you prefer to work on high-profile, complex litigation and transactional legal work — or if celebrity clients and behemoth merger and acquisition matters are your thing — a big firm should be a good fit.

## MIDSIZE STYLE

Some of the most active firms hiring today are midsize law firms, with an average range of 16 to 350 attorneys on staff.

Midsized firms have the horsepower to take on larger clients that include large corporations from sectors such as real estate, litigation, finance, banking and labor. If matters in those areas appeal to you, a midsize firm is right up your alley.

While midsize law firms fall short of the robust compensation for which Big Law firms are known, they do tend to offer better salaries than small law firms.

It's true that midsize firms may not grab a lot of headlines, but firms that occupy the middle ground may still be highly successful and a good place to stake your future. Midsize firms have also led market growth for several successive quarters. A recent report shows midsize firms grew 2.8% in 2023 compared to Am Law 100 firms, which saw their demand contract 0.6%.

## Culture Club

Legal professionals who work at midsize firms are likely to encounter less red tape than big firms while having greater visibility to partners and colleagues.

The cultural advantages of working at midsize firms also include:

- » Opportunity to become a skilled generalist
- » Billable hour expectations that generally are more manageable than at large firms
- » An hourly price advantage over large firms

On the downside, midsize firms typically don't have the resources of big firms and lack the focus of small firms.

Those who fit best at midsize firms want to do a little bit of everything among a wide variety of specialties. A midsize firm can offer a good way to build those skills, which is particularly good during early-career years.

## SMALL WONDERS

There's no shortage of benefits to working at a small law firm (15 or fewer attorneys). These firms often work in specialty areas or deal with complex subjects such as tax or immigration law.

Other contributors to the small firm allure include:

- » More flexible hours
- » Better work-life balance
- » Smaller bureaucracy
- » More casual atmosphere
- » Closer-knit staff
- » More room for upward mobility

Smaller firms also tend to have less in-house competition than big firms, which opens a door for legal professionals to be involved with more of the cases they want.



## Downsize for the Right Size?


Before you settle on the small firm dynamic, let's examine its potential liabilities.

Small firms tend to have a short list of clients that generate the greatest amount of revenue. Losing only one or two of those clients could dramatically change the firm's financial footing.

Job tasks for administrators at smaller practices may also become blurred. But if your career sweet spot is a client-centric role with a firm that is typically more agile and focused, a small law firm may be the place for you.

### ABOUT THE AUTHOR

**Frank Long, MS**, is a professional writer, editor and content creator. He is a graduate of the Brian Lamb School of Communication at Purdue University and is Senior Manager, Content & Communications, for Rapid Legal.

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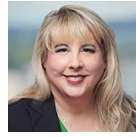


# Anniversaries, Awards and Appointments

## Members on the Move »



**Steffany Amacher, SHRM-CP**, a member of the Chicago Chapter, is now Human Resources Manager at Goldman Ismail Tomaselli Brennan & Baum LLP in Chicago, Illinois.



**Rebecca F. Bennett**, a member of the Oregon Chapter, is now Chief Operations Officer at Cable Huston LLP in Portland, Oregon.



**Colleen Cerdena**, a member of the Puget Sound Chapter, is now Accounting Manager at Keller Rohrback LLP in Seattle, Washington.



**Jennifer A. Denton**, a member of the Houston Chapter, is now Office Administrator at Hunton Andrews Kurth LLP in Houston, Texas.





**Heather M. Kurey, CLM, SHRM-SCP**, a member of the Capital Chapter, is now Office Administrator at O'Melveny & Myers, LLP, in Washington, D.C.



**Felix C. Mesa Jr., MBA**, an Independent member, is now Executive Director at Kaufman & Canoles, PC, in Norfolk, Virginia.



**Garrin Paul Sax**, a member of the Silicon Valley Chapter, is now Director of Administration at Morrison Foerster in Palo Alto, California.



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# What's Happening at Headquarters May 2024

## Legal Management Wants to Hear from You!

Saying succession planning is a challenge for law firms seems like an understatement. But it's imperative that firms have a plan in place for their client's sake and business continuity. This year's print issue sets out to tackle the challenges of succession planning. And we want to hear directly from you, too!

Here's how to participate: In 150 words or fewer, answer the following question: What have you found to be a successful approach to getting the conversation started? Please email your responses to [vdanner@alanet.org](mailto:vdanner@alanet.org) by **Friday, May 17**. Submissions may be edited for clarity.



## The Technology Trap: Rethinking Digital Transformation

Buying the latest technology doesn't always mean you're moving forward. Do you ever wonder why all those shiny new tools don't seem to fix the persistent issues? Or how to get your team on board with changes they don't always love?

This isn't just about technology and applications; it's about people, smart planning and leadership that's as committed to evolving as it is to providing top-notch legal services. In this webinar, you'll walk away with practical steps to move past the tech hype, build a culture that's all about smart change and shape a digital strategy that helps you chart a path to real digital transformation.

Register now to join Affinity Consulting's Debbie Foster on **May 29** at **2 p.m. Central** by going to [alanet.org/upcoming-webinars](http://alanet.org/upcoming-webinars).

## Discover Your Online Community

ALA's Online Community offers a unique way to stay connected to fellow members through user-friendly social media interfaces that offer special features:

- Video meetings
- Direct messaging
- Polling
- Trackable content tags

[ala.tradewing.com](http://ala.tradewing.com)

The ALA logo (Association of Legal Administrators) is in the top right. To its right is a collage of photos showing people interacting with technology, including a person using a laptop, a person on a video call, and a person looking at a screen.



## Check Out *Legal Management Talk* Podcasts!

ALA's *Legal Management Talk* podcasts are your source for in-depth conversations about the hottest topics in the legal industry. The latest episodes cover the billable hour, change management strategies, succession planning and mentorship! Tune in by going to [alanet.org/podcast](http://alanet.org/podcast) or catch every episode by subscribing to ALA's YouTube channel or listening wherever you get your podcasts.






## Propel Your Future with the Susan L. French Emerging Leaders Fellowship Program

Apply now through **June 3** for the Foundation of ALA's Susan L. French Emerging Leaders Fellowship Program.

Fellowship recipients will be awarded tuition and a travel stipend to ALA's Chapter Leadership Institute, as well as educational sessions with leadership coach Judy Hissong, CLM, PCC, and Debbie Foster of Affinity Consulting Group. Recipients will be expected to assume a mentorship role in the second year of their fellowship. Visit [alanet.org/french-fellowship](http://alanet.org/french-fellowship) to find out more about the program and to apply.

## Follow Us

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