

Volume XIII - Issue 1

ALA MISSION

The Association of
Legal Administrators'
mission is to:

Promote and enhance
the competence and
professionalism of all
members of the legal
management team;

Improve the quality of
management in law firms
and other legal service
organizations; and

Represent professional
legal management and
managers to the legal
community and to the
community at large.

Should IT Stay or Should IT Go? *The Clash between in-house IT & outsourced managed services*

Josh Kotler
CEO, Western Digitech

*"If you deprive yourself of outsourcing and your competitors
do not, you're putting yourself out of business."*

Lee Kuan Yew
Former Prime Minister of the Republic of Singapore

*"The other part of outsourcing is this: it simply says where the work can
be done outside better than it can be done inside, we should do it."*

Alphonso Jackson
Secretary of Housing and Urban Development, 2004-2008

IT Outsourcing. The words themselves have many connotations, most of them negative. Yet IT outsourcing continues to gain momentum in the legal marketplace. The reason is clear – generally speaking, firms outsource IT because it works. Properly delivered, IT outsourcing often delivers a better IT experience while reducing overall costs.



Most firms outsource already. The question is really one of degree. Some firms have an in-house IT resource, or resources, and only use an outside company for specific projects for which they have little to no expertise. Some go further and use an outside company to support a portion of their IT on an ongoing basis, and – increasingly – some firms

turn all of their IT support requirements to an outside provider. This level of outsourcing is what I want to focus on.

Why do some firms choose to outsource their IT department while others are perfectly content to maintain a more traditional model? The answer

Table of Contents

FEATURES

Should IT Stay or Should IT Go? The Clash
between in-house IT & outsourced man-
aged services [1](#)

Using ARMA’s GARP Principles to Create
a Compliant Records Management
Program [8](#)

A View from the Region 2 Conference..... [12](#)

IN EVERY ISSUE

President’s Message..... [4](#)

Member Spotlight..... [14](#)

Board and Committees [16](#)

Calendar of Events [16](#)

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PRESIDENT'S MESSAGE

[Lisa Dasher, CPA, CLM](#)

Wicker, Smith, O'Hara, McCoy & Ford

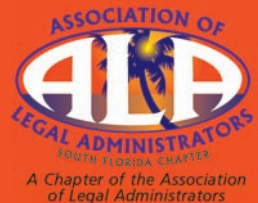
As a member of the South Florida Chapter of Legal Administrators for almost 20 years I have seen a lot of changes in the legal profession and the chapter. The legal community has dramatically changed and so have our responsibilities and the perception of our contributions to our organizations. These changes affect our day to day work lives in many different ways. It is vitally important that as a profession we keep up with these changes. Many of us think that technology is the only issue facing us; but we are constantly faced with new issues in human resources, labor law changes and the ever changing way lawyers actually practice law.

Through the last 20 years our chapter and the overall organization has also evolved and changed to meet the needs of the membership. The only way for our chapter to be relevant to the membership is to constantly grow and advance with the needs of our members. While technology has definitely played a major change in our chapter including the use of the list serve and our website, the evaluation of

educational opportunities and networking has also changed. It is the goal of the board of directors to effectuate change and ensure the chapter is going in a direction that is most beneficial to our members.

When I joined the chapter I know that I felt intimidated by my lack of knowledge because I had recently been promoted to the administrator position. I knew how to do my previous job, but as my firm grew the expectations related to my responsibilities also grew. Our firm's prior administrator was a member of the chapter and one her parting comments to me was to be sure to join ALA. I also felt intimidated when I attended a chapter luncheon or event because everyone else seemed to know so much more than I did. They all seemed so confident and strong in their abilities to run a law firm. I knew that if I wanted to change my perspective I needed to get involved in the chapter.

So why am I sharing some of my personal history? It is important for you to understand that years ago while I was overwhelmed by my lack of knowledge and



A Chapter of the Association
of Legal Administrators



the confidence that everyone else seemed to have, I learned a valuable lesson. The most important lesson was that individuals in our chapter are very giving and willing to share information. I can't count the number of times I reached out to other administrators asking questions about how their firms do something. Recently we have seen how our list serve enables us to share the "how to information" with the implementation of E-Service and E-Filing. Without these resources we eventually will find the answer, but it is definitely the longer path we would travel.

While our profession is an ever changing moving target, I can't

shout loud enough about the benefits of the Association of Legal Administrators at both the international and chapter level. Each of us needs to commit to leveraging not only the technical and educational benefits of being a member, but also developing personal relationships. I can only speak for myself, but I know for a fact that I would not be as efficient or successful as I am today without those individuals who came before me. I commend those individuals that took the time to explain to me "how to do it right". In those years when I felt apprehensive by my lack of experience, not once did anyone in the chapter make me feel inferior, it was all self-imposed.

It may seem intimidating to walk into a room full of people that know each other and look like they have known each other for years. But take a chance and insert yourself into a conversation or the group. All of us are in similar situations and are constantly looking to develop more relationships and resources.

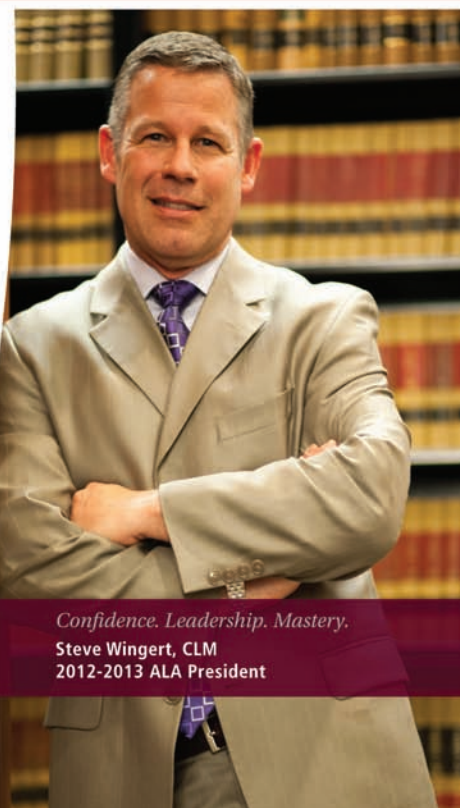
As my term as President has come to an end I am looking forward to seeing the changes in our chapter continue in the years to come. But there is one thing that will not change and that is the bonds our members have forged with each other.

CLMSM
Certified Legal Manager

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

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

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

Continued from page 1 >

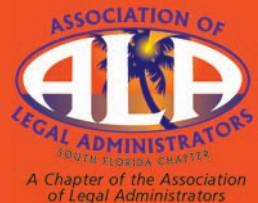
is simple - not all in-house IT resources deliver the same value to their firms. Many firms employ IT resources that, frankly, aren't very effective. In some cases they have been there for years despite this fact because they have accumulated perceived power, and because the firm feels like there isn't an alternative, someone who can smoothly replace them. This feeling of being trapped by IT can't be tolerated and needs to be addressed.

How to Tell If Your In-House IT Resource Needs To Go

- Your firm seems to be perpetually at least one generation behind the technology curve.
- Your IT resource is "too busy" managing the network and addressing nagging problems to work with the lawyers on litigation support or on software training.
- Your IT resource often doesn't come into the office in the morning because they were working during the night on the network.
- Your IT resource spends too much time locked in their office, and not enough time with other firm personnel, helping them leverage technology.
- Your lawyers and staff express frustration that they

don't have the right tools to do their job, or that they can't access their technology anytime, anywhere.

To be fair, I can think of several examples where in-house IT resources deliver tremendous value. I have a client in Coral Gables with two IT staff members that provide great value to the firm, despite the fact that the firm's total headcount is under 50. That's a lot of IT payroll. But in this case the IT department is heavily involved in litigation support and actually bills enough of their time to more than cover their expense. This firm has turned their IT department into a profit center, and, correctly in my opinion, would never consider outsourcing. I have another large firm in downtown Miami (100+ users) that achieves positive results in a different manner. Because the firm is larger, they have a more complex and expensive IT infrastructure. They do outsource a fair amount of the network management and administration. But the costs for ancillary IT services (datacenter, internet, phones, copier/scanner, mobile devices, etc.) are so high that close management of these services can yield substantial savings. Additionally, the line-of-business software products that they use are more sophisticated and cost well



north of six figures. This IT Director spends time working with these software solutions to improve the firm's coordination and overall work product. She does a lot of user training too.

How to Tell If Your In-House IT Should Stay

- IT personnel spend less than 25% of their time engaged in supporting the network, users, and peripheral devices. Keeping the network up and running, and responding to support requests from firm personnel is commodity work that can be handled more effectively by an outside firm.
- IT personnel are heavily involved with legal work, either through litigation support activities or through hands on work with the firm professional staff geared toward increasing their productivity and improving their work product. In-house IT personnel should focus on line-of-business applications that they are experts on and that can't reasonably be leveraged by outside firms.
- IT staff actively train on new technologies in order to stay current. Without ongoing training in-house personnel will become less effective over time, and the amount of money that will be spent with outside consulting firms will increase.

If you decide that your firm needs an in-house IT resource,

think carefully about the work that they are involved with. If they aren't leading the way with leveraging legal applications, working on litigation alongside attorneys and paralegals, and managing relationships with ancillary IT providers, then you should consider making some adjustments. Make sure that the commodity work is outsourced – don't let your resource get bogged down with managing the network and help desk services. If that is all they are going to do then they aren't really adding much value.

Let's focus on one of the quotes I began this article with - Alfonso Jackson's idea that if you can get a better result through outsourcing then you should do it every time. That makes sense to me. As an owner of a small business of roughly the same size as many of my clients (Western Digitech currently employees 21 people) I outsource a lot. For example, I use outside sources for accounting, office cleaning, and legal services. I even outsource portions of the IT work that we are responsible for delivering to our clients (structured cabling). Why would I perform these tasks in-house when my outsource providers are doing a better job for less money than it would require me to spend to keep it in-house? I have more flexibility when I work with outsourcers. If I am not happy with my provider

I can renegotiate or switch to another company.

The bottom line is that IT outsourcing works in many cases, and all firms should consider moving to that model in the same way that they have in so many other areas of their business that don't involve the production and delivery of legal services. Many will find that they are fortunate to have excellent IT resources on staff that actively make the firm better by proactively improving the firm's ability to deliver outstanding work product. They should stay (and be given a raise). On the other hand, many firms will conclude that they have an in-house IT resource that isn't measuring up or that could be better utilized by focusing on litigation technology and line-of-business applications.. Those firms should begin the process of outsourcing all or some of their IT support.

About the author:

Josh Kotler is the CEO of Western Digitech, an IT services firm based in Miami with a satellite office in Tampa. Western Digitech serves as an outsourced IT department for about 50 law firms, and works with another 50 firms that have IT resources on staff. He can be reached at josh@wdigitech.com, or by phone at 786-433-6906.

Using ARMA's GARP Principles to Create a Compliant Records Management Program

- A guide to assist with the proper implementation of a records management program -

By Chad Bevington, Cintas

Developing a compliant records management program is essential for a productive, organized business, but it can be a challenging task. With numerous file labels, retention schedules and varying points of contact, organizing a system that achieves specific business goals while keeping operations compliant can leave records managers and IT professionals frustrated and confused.

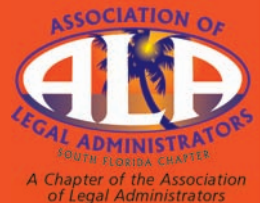
"In the insurance industry, there are multiple types of files and varying file requirements for each state in which we operate," said Cathy Marsh, Assistant Vice President, Corporate Services at Ohio National Financial Services. "While it took us awhile to develop a consistent and streamlined records management program, it has been an integral step in keeping our business running smoothly."

To assist businesses with the creation, organization, security and maintenance of a records management program, ARMA International published the eight Generally Accepted Recordkeeping

Principles (GARP®). As an authority of education on information management issues, ARMA International developed the principles with the help of individuals fully involved in recordkeeping.

The eight key principles upon which GARP was developed can provide a framework for a successful records management program. These principles include:

- 1. Principle of Accountability.** Appoint an appropriate person to oversee the entire records management program. This person will be responsible for structuring the program, delegating tasks and assigning appropriate contacts within departments.
- 2. Principle of Integrity.** Ensure records are authentic, unaltered and accurately reflect the represented organization. Be able to prove an acceptable audit trail and creation of the record.
- 3. Principle of Protection.** Implement standards to protect records and information that



is confidential, privileged, secret or essential to business continuity.

4. Principle of Compliance.

The records management program follows the standards, laws and other binding authorities set by legal organizations or company standards.

5. Principle of Availability.

Records are stored and organized in a manner that allows for timely, efficient and accurate retrieval of requested information.

6. Principle of Retention.

The records management program follows a retention schedule that was developed considering legal, regulatory, fiscal, operational and historical requirements.

7. Principle of Disposition.

The organization takes secure measures to properly dispose of records at the end of their lifecycle.

8. Principle of Transparency.

The records management program is easily understandable to employees and outside parties, including government authorities, auditors and investigators.

Customizing Records Management Processes

By using these eight principles as a framework, records managers can begin

building their own program that reflects their specific business processes. It is important to understand how each principle applies to the organization. For example, when establishing the principle of accountability, records managers should consider the size of their business. For a small organization, it may be acceptable to have one person in charge of the records management program. This setup, known as a centralized system, appoints



one individual who handles all information and decisions related to the program. This person is also responsible for implementing and executing all activity relevant to the records management policy.

However, a large business with multiple departments and types of records will require additional oversight. This system would benefit from a decentralized records management program where a lead records representative oversees the activity of several departmental records representatives who assist with the implementation

and execution of the program in specific areas of the business. These individuals manage the retention schedules, employee training and day-to-day functioning of the program. With this system, records representatives meet on a regular basis to discuss program successes or challenges, changes in the principles and ideas to further develop the system. This system helps delegate responsibility and ensures individual employees can easily contact a records representative when necessary.

Similarly, records managers should consider the size and scope of their business when evaluating the principle of retention. Developing and following a retention schedule can be a challenge if an organization operates in multiple states with different regulations and laws if they receive payments from customers in multiple states. To simplify the program and avoid multiple retention requirements, implement a retention schedule based on the state or region with the strictest regulations and longest longevity for retention. Using this method, the organization will meet all legal and regulatory requirements while streamlining the records management process and eliminating the need to separate files by state. To

10 INTEGRATING KNOWLEDGE AND CONNECTIONS

ensure compliance, decide the appropriate retention period for each type of record with the help of an attorney.

“In our situation, we reviewed all the state recordkeeping requirements and found that Pennsylvania had the most rigorous standards,” said Marsh. “We used this as our benchmark and developed our program around that. It made the program a lot easier rather than negotiating around the legal requirements of several different jurisdictions.”

When considering the availability and transparency principle, records managers are encouraged to review how documents are titled and create a standardized labeling system throughout all departments. Most employees will label records according to personal preference; however, as convenient as this is for individual employees, it results in an unorganized system. This can create a problem if an audit requires proof of a certain type of record and that record is unable to be retrieved.

To create a streamlined system and reduce the amount of time spent filing and retrieving items, implement standards for labeling and storing records that can be integrated throughout all departments.

“When we conducted an audit of our system, we found that we

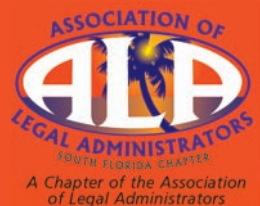
had more than 3,000 different records names,” Marsh advised. “For a journal voucher record, they were titled ‘JV’ or ‘J Voucher’—we had more than 100 different names for the same file. By setting a standard for titling documents, we were able to reduce the number of files to just 120 record names.”

Purging Old Records

When paper records reach the end of the pre-determined lifecycle, GARP recommends secure and appropriate disposal. To ensure the highest standards of security are met, records managers should partner with an AAA NAID-certified shredding provider that destroys documents on a scheduled basis and provides a certificate of destruction for a legal audit trail.

While sometimes daunting, the task of organizing a company’s records is not an impossible task. By using GARP as a framework, records managers can develop a compliant and effective records management program that meets the specific needs of the business and ensures that documents are readily available—or destroyed—at pre-defined points in the process.

Chad Bevington is Regional Business Director of Cintas Document Management. For more information, please visit <http://www.cintas.com>



ALA, SOUTH FLORIDA CHAPTER ANNUAL FISHING TRIP



The View from the Region 2 Conference

Edna L. Barbosa

Firm Administrator, Kozyak Tropin & Throckmorton, P.A.

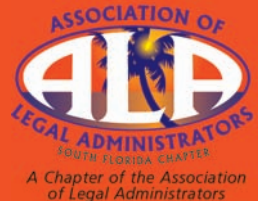
The last time I attended a Regional Conference was in Miami in 2010. I had lost my job and felt so lost. It was encouraging to be invited by Viki Allen to attend. So I gathered myself as best I could and joined my peers at the Eden Roc for a full day of educational conferences and an exciting evening of dancing, friends and meeting new ones.

What I took back from that experience was an uplifting message of hope. I realized that I belonged to an incredible association of professionals that supported me and honestly cared about helping me find a job. I had no idea it would take many months to find a one. But the support of my peers and the ALA did not end at this conference. This very important factor helped me stay focused and continue my relentless quest to find a job in a broken economy. I know I was supposed to write about my experience in the Region 2 Conference in Atlanta but I needed to express the gratitude I felt at a time when hope was almost lost.

I was determined to make it to the 2012 Region 2 Conference. It was a shame that I had missed out on attending the

full conference as intended.

The flight out of Miami to Atlanta was delayed so I had to move fast to get on track with my schedule. Fortunately, I encountered a lot of helpful people at the hotel that were eager to expedite the check in and provide clear directions to the event location. I missed the first session I had signed up for, Leveraging the Power of Outlook. But I was reassured as I was waiting in line that it would be available online. I went through registration and got my tickets for lunch at the Exhibit Hall. It was great to run into other administrators I had worked with in the past and grab a quick bite to eat before going to the next session, "Law Firm Leadership, The Critical Role of Law Administrators." It was an engaging and provocative presentation. I had seen the presenter before but I was glad to listen to him again as I learned new insight about the people that we work for, the attorneys. He mentioned that attorneys are highly skeptical. They hate change and are risk averse. Attorneys love autonomy, have low resilience and have low sociability and of course, have a high sense of urgency. I had an epiphany as I heard this and jotted it down so I would



never forget. It made a lot of sense to me. I had just finished the firm's open enrollment period. I had made changes to the existing benefit package to improve and add choices. The implementation had been challenging. I was new to them. It did not occur to me that this would fall under the category of "hate change" and "risk averse". So I will never do this again. Just kidding, of course I will do it again. Change is what administrators bring to the table, new ways of doing things to improve upon the old. Innovations,

progress, all of these things make our jobs very challenging and very rewarding in the end. But knowing these facts about attorneys helps me develop a process to accomplish this.

The next session I attended was "How to Motivate, Train, Engage and Compensate.". I am in the process of reviewing the policies and creating a new handbook. This will no doubt be quite an undertaking. I plan to engage the staff in the process so they feel they took part in the end result. The presenter had other

recommendations for motivation of employees: Don't assume you know an employee's career; recognition is important, check in with your employees, don't become complacent and think about learning opportunities. All of these are important and practices that I will continue to engage in.

I look forward to continue learning through these conferences, webinars, luncheons the ALA provides. This knowledge is what I bring to those that I work for and share with my peers.

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National Harbor, Maryland (Washington, D.C. area)
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Member Spotlight

Meet Lauren T. Pollack, Director of Human Resources

Kelly Kronenberg

Firm Size: 190

Years in Field: 7

What do you enjoy most about your job: Developing employees-helping them in any aspect of their job

What do you dislike most about your job:
Candidates not showing up for an interview

What impact has ALA had in your job performance? Not yet, I hope for it to!

The most difficult situation I have had to deal with was: It's HR- there is always something!

In my role, I never thought I'd have to: Again, it's HR!

In the office I try to set an example by: Walk the walk and talk the talk! Always being a leader and leading by example. Professionalism, poise and providing excellent customer service are key.

If I weren't in my current position, I would like to be: A Veterinarian

Favorite Musical Artist: Too many to write!

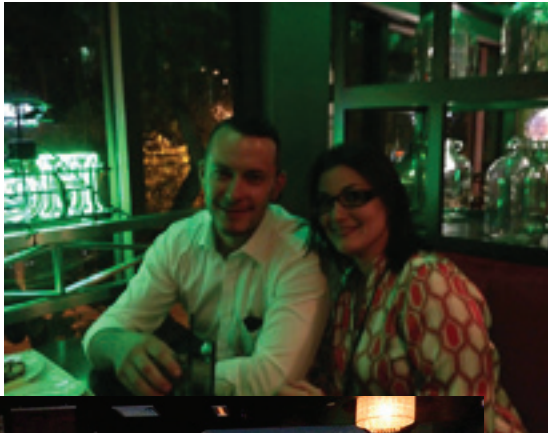
Favorite TV Program: I have to admit that I am a reality show junkie- Bravo TV!

Last Book Read: 50 Shades

Hobbies: Working out!!! I am training for a fitness competition



In January & February, Strategic Professional Staffing/MyMotionCalendar.com hosted happy hours at Cava's Wine Tasting Room and Fado's, both in Mary Brickell Village.



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Calendar

May 7, 2013

12:00-1:30 pm
Broward Monthly Lunch Meeting
The Tower Club

May 8, 2013

Miami Monthly Meeting
12:00-2:00 pm

May 9, 2013

Downtown Miami
Happy Hour

May 15, 2013

2:00-3:00 pm
Webinar: Marketing (Mis) Alignment: Closing the Gapo Between Marketing and Law Firm Leadership
Free to Chapter members
In Miami @ Bilzin Sumberg
In FTL @ Holland & Knight

May 16, 2013

5:30-7 pm
Broward Happy Hour

May 23, 2013

5-6:30 pm
South Miami Happy Hour

June 1, 2013

6:00- 10:30 pm
Marlins vs. Mets Game
Marlins Park

June 11, 2013

12-1:30 pm
Broward Monthly Lunch
The Tower Club

June 12, 2013

12-1:30 pm
Miami Monthly Lunch

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