

# The NETWORK

INTEGRATING

KNOWLEDGE

AND

CONNECTIONS

PAST

NOW

FUTURE

## SUCCESSION PLANNING

Securing the Firm's Future



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PLATINUM FOR ALASOFLA

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## THE NETWORK

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# PRESIDENT'S MESSAGE

VICKI L. SMITH-BILT, SPHR, CLM  
GREENBERG TRAURIG

Welcome to this issue of The Network, the newsletter of the South Florida Chapter of the Association of Legal Administrators (ALASOFLA)! Our chapter is one of the oldest in the Association of Legal Administrators (ALA), receiving our charter in 1972. Since our inception, we have been the premier networking and professional association for Legal Management professionals in Miami-Dade and Broward counties, and that remains the goal of each successive Board of Directors.

Please explore our website ([www.alasofla.org](http://www.alasofla.org)), which is your source for all chapter information and events. You'll note that our logo, Flori the Flamingo, changes appearance for different events and special occasions, so be sure to check the website frequently! It, as well as the ALA's website, [www.alanet.org](http://www.alanet.org), is open on my desktop every day.

Your memberships in the ALA and the ALASOFLA are designed to enrich your professional life. Our programs and events are carefully and thoughtfully created to enhance The Power of You.

### What is The Power of You?

According to Merriam-Webster, power (noun) is the ability or right to control people or things. You have the ability and the right – even, the responsibility

– to control your professional development. And that's where the ALASOFLA helps you maximize The Power of You.

Our chapter provides numerous opportunities for you to participate in professional development activities, and we offer multiple locations from which to do so. A few examples:

- Monthly ALASOFLA luncheon meetings, with speakers who cover all of the competencies in ALA Education – Communications/Organizational Management (CM), Financial Management (FM), Human Resources Management (HR), Legal Industry/Business Management (LI), and Operations Management (OM) – held in two centrally convenient locations, with the same speaker, on consecutive days: second Tuesday in downtown Fort Lauderdale in Broward county, and second Wednesday in downtown Miami in Miami-Dade county.

- ALA Webinars. These monthly webinars cover a wide range of topics, again encompassing the ALA competencies, and are offered to you free of charge in three geographically diverse locations – downtown Miami, downtown Fort Lauderdale, and south Miami.

- ALASOFLA Happy Hours. These monthly events are held

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**Sharon Meit Abrahams, Ed.D.**  
**National Director,**  
**Professional Development**  
**Foley & Lardner LLP**

# Succession Planing: Securing the Firm's Future

After working 3 When you search the Internet on the term "succession planning" you will receive over 2 million hits. These hits range from companies offering their services to help businesses do effective succession planning to software, forms and tools that can be utilized. The question you might ask is "why is there so much out there about this"? The answer is that succession planning is critical for the health and future of a business, any business, but especially for law firms. In a survey of Fortune 500 companies it became apparent there is a critical need to focus on succession planning as nearly one third of the companies felt they would not be able to fill future leadership vacancies.

With the economic changes greatly effecting the legal industry it is now imperative that firms take a look at how to implement succession planning. As baby boomers begin to retire, good lawyers receive pink slips and younger people needing to get up to speed quickly firms must create a plan to move people and information forward in their firms.

Wikipedia defines succession planning as an acceleration of the transition of qualified people from individual contributors to managers and leaders. In law firm lingo this means identifying not only partners, but associates who can be groomed and developed for firm management roles.

This is where the strategic goals of the firm need to line up with the individual goals of the lawyers. The new generation is making this task difficult because there is a perception that the goals and strategies are not aligned. However this is not true, what needs to be taken in consideration is the approach. Here are steps to follow to develop an effective succession plan.

First and foremost is to identify the needs of the firm. To determine talent needs the firm should examine all the leadership roles. This assessment would identify the individual, their age, their function, their contribution, and the qualifications necessary to succeed in the role. Key to this process is to develop competencies and behaviors that can be established for comparison among the talent pool. Leadership competencies would include teamwork, collaboration, and coaching along with the ability to inspire others to reach their potential. In an effort to identify and even quantify leadership skills current leaders

## IDENTIFY

Examine leadership roles to determine talent needs.

## COMPETENCIES

Establish behaviors for comparison of talent pool.

## REVIEW

Are there individuals who can fill leadership roles in future?



should conduct self assessments. Good leaders understand what motivated them so they can help motivate others.

Once this information is collected then the firm should review the remaining talent to determine if there are individuals that can fill leadership/management roles in the future. In reviewing the talent that exists at a firm ask the following questions:

- What is needed? – look at competency, skill and experience
- What is no longer needed? – look at competency, skill and experience

Decisions need to be made about: who can be built up, who is ready now and who needs to be removed from the talent pool.

If there is a clear understanding of the capabilities necessary to succeed in the leadership roles then training and development opportunities can be offered to coach talent into their future roles. This is where a “corporate university” fits into a law firm structure.

If a firm has a professional development function then this is the appropriate place for the university to sit. However if the firm does not have an internal

training department then this function should fall under the strategic planning umbrella. The firm’s strategic mission, vision and goals long with the leadership competencies will filter through the university into the proper training and education that will develop the future leaders.

Quality developmental activities are key to successfully creating future leaders. This would include creating opportunities for partners or associates to lead firm committees, take temporary assignments in other offices, especially overseas, and receive highly valued training through an MBA or similar program. Other important factors are mentoring and coaching as well as appropriate and individualized feedback on all aspects of performance.

To assure a firm has a healthy pipeline of internal talent it is important to establish and monitor a formalized succession planning process. Whether the responsibility falls in the managing partner’s realm or in the professional development arena it is necessary to have a process that is supervised and evaluated for effectiveness on an on-going basis.

The classic evaluation model is based on the 4 level framework detailed by

Kirkpatrick. The first level is determining satisfaction and over all reaction with the succession planning system that the firm has created. The second level is to measure if the participants moving through the system have developed necessary skills and knowledge. The third level determines if the participants are able to implement and apply what they have learned. The final and most important level is to measure the return on investment otherwise known as “ROI”. A successful ROI shows the impact of the program outweighs the cost of the program.

The structure of a succession planning process will be unique to each firm. Firm management can choose to solicit the assistance of an outside consultant or design and manage it internally. With the abundance of information accessible via the internet, books and talent management experts every firm has the tools available to ensure the future success of their firm.

This piece first appeared in: Practice Innovations, Vol. 11, No. 13.



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# TORONTO

By: Peter McIntyre

## ALA ANNUAL CONFERENCE

Since joining ALA last year I have become friends with many Chapter colleagues, and so I thought attending the Annual Conference would further my professional development. As a CFO I knew it would be difficult to justify taking the time and expense to travel to the conference, so I applied for and was awarded a scholarship from the Chapter! Weeks later my position at my firm was eliminated, but my family, friends, and ALA colleagues strongly urged me to attend the Conference anyway. The Chapter was willing to make an investment in me, and being unemployed was the ideal time to network on a large scale.

Toronto was Emelyn Bruguera's and my first ALA Annual Conference, but we

had both travelled to the Financial Forum in New York last June. We were each assigned a conference buddy to help us to navigate our way through the events. Luckily my buddy was Viki Allen. Although the conference started Monday night and ended Thursday, for financial reasons I decided not to leave for the conference until Tuesday. In hindsight my late arrival was short sighted, especially since I missed the Chapter dinner and the Keynote Speakers.

Upon arrival the weather in Toronto was cool and refreshing, but I got to the conference just as the day's sessions were ending. A Vendor Expo and Silent Auction had started, and they continued throughout the conference.

We attended awards ceremonies both Tuesday night and Wednesday afternoon, and it was then I realized the level of respect, recognition, collegiality, support, and collaboration in our Chapter existed throughout ALA. I didn't have time for sightseeing, so it was a thrill to be invited to the CN Tower for hors d'oeuvres and cocktails on Tuesday night. We could see all of Toronto from almost ¼ mile up, which would have taken days to accomplish on the ground!

On Wednesday and Thursday I attended eight sessions focused on: Profitability, HR (investigations and strategic thinking), Strategic Planning, Business Development, Ethics, and Future Trends (Vision and



mission statements, then fee arrangements and pricing). The sessions were fantastic and thought provoking, and while I learned a great deal, some information was conflicting. An organization that I consider to be unnecessarily controversial was lauded for their service delivery model in an HR session. Hourly billing rate increases went straight to the bottom line in the Profitability session, but could jeopardize client relationships in a Future Trends session. Vision and mission statements were not required in the Strategic Planning session, but they were the focal point of a Future Trends session. In the end the sessions

reinforced the value of learning and sharing as much information as possible from different perspectives, viewpoints, measures and tools; then drawing your own conclusions, defending the reasoning behind your logic, and collaborating whenever possible.

On Wednesday night after a couple of receptions, I was fortunate enough to have spent time with Viki and Vicki, two seasoned Chapter members. This provided an opportunity to share ideas with some of the most knowledgeable people in the industry.

On Thursday we attended a sit down dinner, and three of our Chapter members won back stage

passes after the REO Speedwagon concert! Everyone in the Chapter felt like a teenager at the concert. After the concert we attended a dance party, and then a few of us from the Chapter went out and met with our new Regional Director Travis Armstrong. Early Friday morning, Judi Pawloski shared her ride to the airport with me, and that provided one last opportunity for mentoring and support from an industry expert.

We all made and maintained valuable professional and personal connections. Thank you to Viki, the ALA South Florida Board, and everyone in the Chapter and all of ALA who attended. I'm going to keep on loving you!



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# NO REGRETS IN TORONTO

CONFERENCE OFFERS FRESH PERSPECTIVE

This year, as a recipient of a South Florida Chapter scholarship, I had the honor to attend the 2014 ALA Annual Conference in Toronto, Ontario. Toronto is a beautiful city with nice weather (at least in May!) and great restaurants, which sums to a great experience.

The South Florida Chapter had 24 members in attendance, which was a wonderful turn out – way to represent South Florida! The Chapter's president coordinated a chapter dinner our first night in Toronto, and it was a great way to kickoff an amazing week. There are many sessions to choose from so it is difficult to see and find each other, which makes group events a treat. One such opportunity to unite was at the Award Ceremony, where our South Florida Chapter was awarded with the President's Platinum Award!! We sported our ALASOFLA logo "polos" with pride!

The sessions were valuable and subject matters come in many varieties; there were over

90 sessions to choose from to completely fill your day. A few of the many highlights for me were: keynote speaker Mark Kelly (astronaut) and the life struggles of his wife, Gabrielle "Gabby" Giffords (former Congresswoman from Arizona), after her attempted assassination in 2011. Her "Endeavour to Succeed" is an amazing and inspiring story to hear; Michael Cohen from Duane Morris reminded us of the "do's and don'ts" of the Human Resources world in "Administrators Guide – Inspire Motivate and Achieve Results"; "Mastering Excel to Save Precious Time" was a delight – yes, I love MS Excel; as well as "Designing Healthy Work Environments: Proactive Ergonomics for Safety & Savings", which discussed all aspects of helping your employees be comfortable and safe which in turn increases work productivity and results. The sessions were endless, and like all ALA conferences, there were plenty to perfectly fit your needs. Of course, the Grand Finale Event was a blast! The dinner and REO Speedwagon concert followed by dessert and dancing were great – all thanks to our VIP business partners!

Canada had much to offer beyond maple syrup and donuts,

such as; education, networking, and amazing sites, including dinner at the tallest structure in the western hemisphere, the CN Tower (and largest in the world when it was built in 1976) – what a view! If you visit Toronto and have time for an excursion, Niagara Falls is a must-see! I had the pleasure and incredible experience of taking a flyover tour on a helicopter. WOW! If you make it to the falls, look into the Hornblower Niagara Falls boat tour – very wet but loads of fun. Visiting Toronto's Centre Island was a treat, which is just a short ferry ride from the Harbor, and it takes you from the "big city" feel to beautiful gardens and beach. I was introduced to Tim Horton's early in the trip, and was quickly addicted to their coffee and

donuts from the very first visit! Needless to say it was my favorite part of each morning.

Conferences are a large part of the ALA. They allow us to

educate ourselves on the new trends across the country and help build long lasting friendships with other chapter members. But remember, they are only as valuable as you make them. So,

if it seems overwhelming to get out there and meet new business partners and administrators, no need to worry! In the end you'll learn it is easy and fun. Everyone is very welcoming and always willing to help. After returning from the conferences I feel rejuvenated and return motivated and with a fresh perspective of what is happening at other firms as well as new ideas I can implement at my firm. If you are considering attending a conference in the future, I highly recommend it. You will not regret it!



Kristine Blanco  
Gordon & Rees, LLP





# IT'S ALL GOOD!

**Marlon F. Mendez**  
Holland & Knight

I have been attending the Association of Legal Administrators Annual Conference for several years, yet every year I feel like a first time attendee. Why? Because it's simply all good! Like the lyrics from the song "Feeling Good"... "And this old world is a new world." ALA Conferences never get old when you open yourself to new experiences, new ideas, and you truly believe that you are an integral part of the future of legal management.

Here are a few items that provide you with a first time attendee feeling and still helps you make the most out of your conference experience:

- The decision to whether or not you will attend the conference--this can be a daunting task. First, who will subsidize the cost? Second, is your employer approving your taking the time to attend the conference?

Perhaps, you are thinking of adding a vacation to the conference. How do you make it happen?

- Putting together the Conference schedule, making sure to choose sessions that are relevant and applicable to your area of interest. During the planning process, the main reason or goal for attending the conference comes to mind.

- Sorting out Social Events to attend-- There will be many VIP invitations from Business Partners but your time is very limited. Trust the Business Partners' invites that are of most interest to you, and allow yourself to have a good time while networking.

- People--find out who is attending the conference from our chapter; know that you will be meeting new people and reconnecting with fellow members and

Business Partners.

- Travel--what is the best itinerary? Always consider direct flights to optimize your time. Packing? The idea is to pack lightly to avoid unnecessary baggage fees, however weather conditions should be considered.
- City--discover the city's highlights and major tourist attractions and work these around the conference schedule.
- Venue--it is important to find your way around the convention center in order to complete the conference registration and familiarize yourself with the flow that allows you to enjoy fully and for the conference experience to be more productive.
- Lodging--consider price and location; whether you are staying at the conference hotel or



I'm pleased to announce our new Public Relations Committee Chair, Adilen Montes, of Levine Kellogg Lehman Schneider & Grossman, LLP (am@lklsg.com)! Thank you, Adilen, for becoming our newest Volunteer Leader in the ALASOFLA!

Adilen needs volunteers for her committee; specifically, we need one or more individuals who are interested in the Social Media aspect of PR, and who are enthusiastic about posting to our Facebook, Twitter, Instagram and YouTube accounts. You don't even need to know how to do this; just be willing to learn!

If you are interested, please contact Vicki Smith-Bilt, [smith-biltv@gtlaw.com](mailto:smith-biltv@gtlaw.com)



you plan for alternate hotel accommodations, expect the unexpected.

- Eateries--finding your favorite place for breakfast, lunch or dinner. Always check first with other fellow chapter attendees as chances are that they have already discovered one or two of those places and are willing to make a recommendation.

- Convenience stores--its recommended to quickly do a smart-phone search to locate stores for sweets, snacks, water, over

the counter medication and other emergency items that will definitely be significantly more expensive at the hotel's sundry or gift shop.

- Internet/Wi-Fi connection. You may want to find out whether the hotel grants any discounts based on reward programs or business travel so as to save on internet fees. You will most definitely be required to have contact with your local office and will find the need to check your e-mails or work on the project your Boss has

asked you to complete during the conference week as the fact that you are attending a conference may have been totally disregarded.

- Last minute changes--Hope for the best and prepare for the worst. Adjust to time and weather conditions. In conclusion, when attending an educational conference, give yourself a fresh start; plan ahead and understand that what you put into it is what you will get out of it.



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## PRESIDENT'S MESSAGE CONT'D...

at a variety of locations, and are great venues for meeting other members as well as our business partners, who provide products and services to our industry, and who support our chapter's activities, for which we are grateful.

Recognizing that our lives are filled and enriched by much more than our professional work, we also have crafted volunteer opportunities for our charitable activities that include family and friends. At a recent dog adoption event, we brought children and grandchildren to help walk the dogs and introduce them to prospective forever families.

Have you considered raising the visibility of The Power of You through becoming a volunteer leader of this organization? I cannot overstate the benefits that I have received through my ALASOFLA and ALA volunteerism. I'm serving as your President for the second time (the first was in 2001-2002), have served on the Board for several years, and have had amazing experiences as a Region 2 Officer and a member of the Certified Legal Manager (CLM)SM

Certification Committee. There are volunteer opportunities for everyone on every timeline; some are project-specific and require a small commitment of time. Others are more time-intensive, but all are manageable, and the balance always inures to the benefit of You! Please contact any Board member if you are interested in serving as a volunteer leader in the Chapter.

The crown jewel of ALA's professional development and educational focus is the Certified Legal Manager (CLM)SM designation. The CLMSM program provides the opportunity to demonstrate you have mastered the knowledge, skills, and abilities to operate at a high level of expertise in the field of legal management. I encourage you to educate yourself about the CLMSM (see <http://www.alanet.org/clm/>). There are active study groups in the ALASOFLA forming right now, in downtown Fort Lauderdale, downtown Miami, Coral Gables, and Dadeland; details are posted on [www.alasofla.org](http://www.alasofla.org). This is your chance to take The Power of You to even

greater heights! I think you'll find the journey to CLMSM certification both personally and professionally rewarding.

What is preventing you from maximizing The Power of You? The most common lament? "There's not enough time." I understand; we all feel the tyranny of time every day. I'd like to challenge you, though, to put yourself on your own calendar. Make maintaining and increasing your Power a priority. Invest an hour and a half for a monthly luncheon, network with your colleagues, meet new members and guests, and listen to a speaker who may have a direct impact on providing a solution for you. Invest an hour in a webinar that can give you a new tool to correct an issue that's been on your mind. Reward yourself with an hour or two to wind down and recharge. Have some fun with your family and do a good deed.

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### IT'S PLATINUM FOR ALASOFLA!

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"Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results."

--Andrew Carnegie

"None of us is as smart as all of us."

--Ken Blanchard

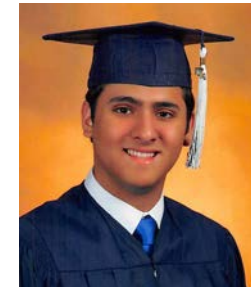
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--Phil Jackson

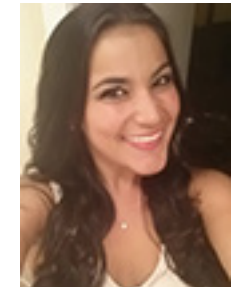
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- A common billing model that puts ALL THE RISK on you, the customer, when buying IT services; you'll learn what it is and why you need to avoid agreeing to it.
- Exclusions, hidden fees and other "gotcha" clauses IT companies put in their contracts that you DON'T want to agree to.
- How to make sure you know exactly what you're getting to avoid disappointment, frustration and added costs later on that you didn't anticipate.
- 21 revealing questions to ask your IT support firm BEFORE giving them access to your computer network, e-mail and data.



Ilan Sredni  
President & CEO



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## August 7, 2014 Webinars

Webinar: Legal Secretaries:  
The Future of Law Firm  
Staffing  
3 pm - 4 pm  
Free to Chapter Members  
Miami-Dade & Bilzin  
Sumberg: RSVP to jbenito@  
bilzin.com  
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## August 12-13, 2014 August Lunch Meetings:

Details TBA - Save the Date  
11:45 am - 1:30 pm  
Broward: August 12, 2014 at  
the Tower Club and  
Miami-Dade: August 13,  
2014 at the Hyatt Regency

## August 17, 2014

Marlins vs. Diamondbacks  
Game  
Marlins Park  
1 pm - 4 pm

## September 4-6, 2014

Business of Law Conference  
Portland, OR

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