INTEGRATING KNOWLEDGE AND CONNECTIONS

The Network

A Chapter of the Association of Legal Administrators

Volume XI - Issue 1

ALA MISSION

The Association of Legal Adminstrators' 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.

Celebrating 40 YEARS 1971 - 2011 ALA Association of Legal Administrators

Research Study: Law Firms Seek More Client-Focused Solutions

By Charles A. Volkert, Esq.

Although law firms have faced pressure before to reconsider many of their traditional approaches to delivering legal services, the economic downturn has reinforced the need to find new solutions. Corporate legal departments are demanding more value for their spending, greater billing predictability and transparency, better communication and improved efficiency. Law firms are finding, in turn, that if they're to remain fiscally sound and competitive, they must improve their service delivery processes – no matter how established these may be.

A new research paper by Robert Half Legal, Future Law Office: Delivering Maximum Value in a Cost-Conscious Legal Era, examines how law firms are adapting to changing client expectations and describes ways they can enhance their value proposition. The annual project entails extensive research, interviews with leading experts and surveys of attorneys. Several of the trends discussed in detail in the report are summarized here.

Operating More Like the Businesses They Serve

The tough economy has forced law firms to adopt a more business-like approach to delivering services, rather than continuing to use a model that has been largely confined to the legal industry. For example, rather than operating primarily on the "billable hour" method of delivering services, many firms are considering how they can deliver the services clients want while remaining within certain cost and quality parameters.

Corporate legal departments are pushing for alternatives to hourly billing practices. A survey by the Association of Corporate Counsel (ACC) found that 60 percent of chief legal officers said they would prefer that firms use alternative fee arrangements more often. Fixed fees are the most popular option because clients know exactly what a legal matter will cost at the outset. Other alternatives gaining wider use are

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ASSOCIATION OF LEGAL ADMINISTRATORS
SOUTH FLORIDA CHAPTER

A Chapter of the Association of Legal Administrators

Celebrating 40 YEARS 1971 - 2011
ALA Association of Legal Administrators

PRESIDENT'S MESSAGE:
You be the judge…..

Marlon Mendez
Holland & Knight
marlon.mendez@hkplaw.com

Not only did my tenure as your President coincide with the significance of being your 37th president but also with my turning 37. And so, with those two simultaneous omens, I set out on my journey as Chapter President a year ago.

The presidency was uncharted territory. However, the knowledge that others who came before me had made many valuable contributions to the mosaic or masterpiece that is our South Florida Chapter ALA "SFALA" provided a great measure of comfort as I, too, hoped to do the same. I knew I was in for a challenging ride which would test my creativity to enhance and expand the collective and unique colors, shades and hues of the SFALA tapestry. I was confident that our members would be supportive and that was a very empowering feeling. I genuinely hope my presidency has resulted in another additional color to that tapestry, and that each of you recognizes the stroke of my brush. You be the judge.

I have been enriched by this experience and believe I have professionally grown by leaps and bounds, in large part with the encouragement, good wishes and backing of our multi-talented members and Business Partners. Our members have been instrumental in my gaining a clear understanding that past limitations, present drawbacks and potential future challenges in our chapter can be overcome with a stroke of the brush from our leaders and proactive members, to achieve our common goals --excellence and distinction. By their involvement in our chapter, our Business Partners -- experts in their field -- have clearly demonstrated a commonality of purpose, synonymous with our chapter goals.

The role of president has given me unique opportunities to represent Region 2 during the Association Nominating Committee, to welcome and share responsibility for mentoring new members, and to collaborate on many activities that has positioned our chapter to achieve the Platinum Chapter of the ALA designation at this year's Annual Conference in Orlando, Florida.

I want to thank ALL the members of this chapter for their efforts, involvement and contributions to making this an outstanding and fun chapter. You are the backbone of this organization!

I would also like to thank the Board, Viki Allen, CLM; Lisa Dasher, CPA, CLM; Jackie Fleites, David Hirsch, Mario Rumasuglia and Tami Segal for their infinite wisdom and mentoring. I also want to thank the Committee Chairs and the members of their teams. Without your input and

participation, our chapter would not have relevance for our members. The work and dedication of our many volunteers throughout the year have been a fundamental catalyst to the success of our various chapter events.
Our Business Partners also have made an enormous contribution to my presidency with their invaluable support to the chapter and our members. Each of you is an important link to our success.

I want to express my appreciation and gratitude to Rita Alli, President of the ALA, Executive Director Larry Smith, and Members of the Region 2 Team for their never-ending support. Last, but certainly not least, I want to extend a very special thanks to and recognition of my firm, Holland & Knight LLP for their understanding, unwavering support and encouragement both before and during my Presidency. Much of my challenging ride would not have resulted in this rewarding experience had it not been for Claudia A. Hoffman, SPHR, CLM to whom I owe a debt of gratitude for putting me in touch with the ALA and for believing in me. Thank you.

In 2012, our chapter will celebrate its 40th anniversary. It will be a special time to reflect upon our past and future goals. I cannot envision anyone other than Viki Allen, CLM to assume this office as head of this dynamic and growing organization. I am confident Viki will diligently work to continue to offer our members and Business Partners an infinite number of opportunities, challenges and exciting ideas.

I'll be around so, this is not a goodbye but only a "see you pronto…."

ALA Association of Legal Administrators
Platinum Level Chapter
2011

CONGRATULATIONS TO MARLON MENDEZ, THE 2010-2011 BOARD OF DIRECTORS, AND ALL THE COMMITTEE CHAIRS FOR ACHIEVING PLATINUM CHAPTER STATUS

Mountain Climbing or: Setting Life Goals

By: María Cristina de la Vega, ProTranslating

My mountain climbing experience, while limited, includes a recent excursion on the beautiful Inca Trail, in Peru. There are many allegorical parallels between mountain climbing and goal setting, which I'd like to discuss.

Upon reaching the summit, as with any goal, you can expect to feel a great sense of achievement, but on the way toward your goal you will certainly encounter obstacles. On the Inca trail I had altitude sickness, but following instructions, I became accustomed to the scarce oxygen and at daybreak was able to enjoy seeing the breathtaking Sun Gate, offering spectacular views of Machu Picchu, our goal on the climb.

Fortunately, by the time you make it to the top either in mountain climbing or through one of life's lessons, you have usually acquired the equanimity to calmly enjoy your surroundings, plus a quiver of tools that allow you to overcome difficulties. Along the way, you start understanding your new environment. Once you reach your goal, the problems may not have changed, but you will have. You will be better equipped to understand them, deal with them and experience the unique transformations that can only come after a journey.
In many cases, as you develop, your vision changes. You mature as you assimilate lessons. Your arsenal is fortified, though perhaps not in the way you anticipated.

As the old Chinese proverb says, “A journey of a thousand miles begins with a single step.” To reach the top, one must first visualize how to get there. At ground level, perspective is not the same as at the summit, where you have a bird’s eye view of the topography. At first, it may seem that the climb is through an impenetrable jungle but as you climb methodically, you are better able to pick your paths. The view improves as you gain altitude and the trees start to thin out. The winning combination is knowing what you want and which of your personal values support your goals.

In any project, have faith that you can accomplish whatever you can imagine. Start taking baby steps to implement that vision. Focus on the result, and go forward. There is no greater deterrent to fulfilling goals than inertia or fear of failure. For example, a person decides not to follow his dream of becoming an accomplished musician because of the thousands of hours of practice, auditions and competitions that are part of the journey.

In practice however, everything sorts itself out gradually and the more ground one covers, the more prepared one is to overcome once seemingly insurmountable odds. Once you mindfully begin the ascent, hitherto unseen opportunities open along your path and hasten progress.

I am reminded of when I made the commitment to go back to school for an MBA at the age of 56. It had been over 30 years since I had been a student. I had a phobia about the level of math skills I would need. I had tried to go back to school before and had to drop out for lack of time. I was fully engaged in running my language services company on a day-to-day basis, and the economy was in the midst of a recession. We were working twice as hard for less profit. It seemed impossible, yet one step at a time, I submitted the paperwork, attended orientations, took online courses and hired a tutor to supplement my finance and accounting skills. I found an executive program that met on Saturdays so I could continue to work. I focused on putting my best foot forward and was persistent in my efforts to do well.

I was the eldest student in the class and at the end of two years was voted most outstanding by the faculty. It all happened because I sustained my vision of getting the degree and applied personal values such as sense of responsibility, appetite for problem-solving and love of knowledge. It was a taxing but rewarding experience which has stood me in good stead. Yet it would not have happened if I had not confidently started the climb and stuck it out. The experience led me to corroborate that one can achieve whatever one can visualize. Since then, I have gone on to fulfill other personal and business goals once considered farfetched, like offering services around the globe, being a guest lecturer, writing articles regularly for several publications, getting an advanced scuba diver certification, and teaching yoga.

My brother, Alberto Salazar, a world-class marathoner in the 1980's, relates similar experiences striving toward significant goals. While only in his twenties he tallied major victories at the New York and Boston marathons. He visualized himself winning, held that image, trained and learned from the experts. During each race, he would just concentrate on placing one foot in front of the other, until he crossed the finish line. I remember visiting him after he set a world record at the NY Marathon in 1981. He was lying in bed in a suite at the St. Regis , enthusiastically chatting with the family, when I noticed the bed sheets around his feet were all bloodied. He explained matter-of-factly that he lost several toenails in the process.

Here, then, is one of the many lessons to be learned: always be prepared to put some skin in the game if you consider the result worthwhile.

About the author:
Maria Cristina de la Vega is president of ProTranslating, the largest language services provider based in Miami. She holds an M.B.A. and has more than 35 years of experience in court interpreting, is a federally certified Spanish interpreter and is also certified by the State of Florida and the National Association of Judiciary Interpreters and Translators in that capacity. Ms. de la Vega has done work for prominent law firms including Akerman Senterfitt and Holland and Knight. For further information visit www.protranslating.com

Associate Business Partner Spotlight
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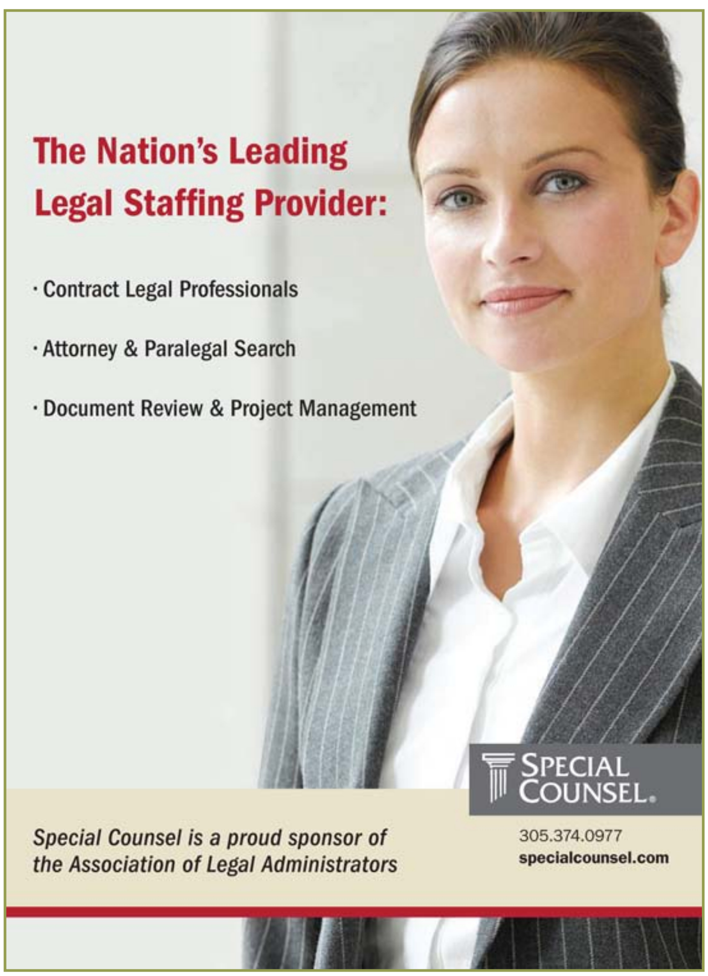
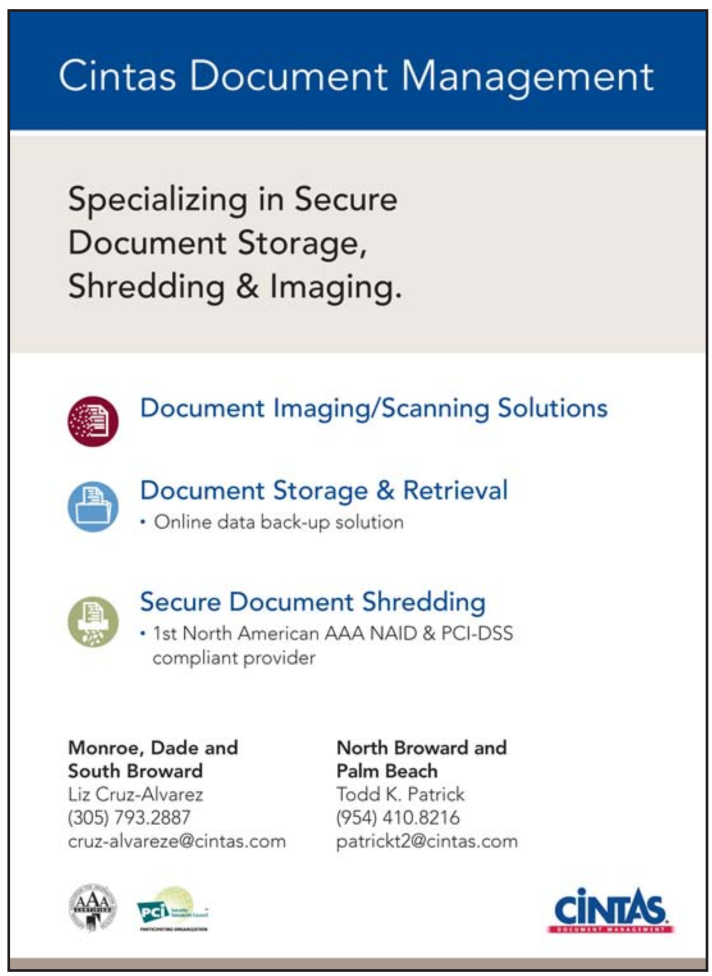
MONTHLY NETWORKING LUNCHEONS

January: Larry Smith, Executive Director of the ALA presented "The State of the ALA" at the January Membership Luncheon





February: Paula Black presented "A Book of Business Is Power" at the February monthly meeting

Tips for Developing an Effective Records Management Program

By: Todd K. Patrick, Cintas Document Management

A clearly defined plan for record retention and disposition is a vital component of a complete records management program. While it may seem easier to keep everything, this is actually a losing strategy. Why keep a record that could potentially be used against you in a law suit that you are under no obligation to keep? Additionally, costs for both paper and electronic record storage and retrieval can add up. For example, if you maintain 20 years of records, all of that information is potentially relevant in litigation whether it be emails, paper files, databases, spreadsheets, etc. As part of standard litigation, attorneys normally collect information and work with vendors to process that data into databases. The cost associated with this can be astronomical.

As corporations' information management systems, policies and practices continue to become an increasingly scrutinized element of legal compliance, having an effective document management policy in place is critical. If an organization has a well documented policy in place, executives can easily explain their practices during litigation and quickly confirm if a particular record was deleted as part of its document retention process. It is also important to have clear and well-defined procedures in place that people can easily understand to further validate the process. Risk and costs associated with storage, preservation, collection and review are minimized by the corporation's ability to manage information well.

Practical Realities of Implementation and Tips for Success

There are approximately 4,700 federal statutes and tens of thousands of state regulations that affect records management. Many of these address the legal industry. The first step in developing an effective record information management program is to understand your business and industry, and what regulations apply. The program's purpose is not just about reducing the number of records and information within the organization, but also about preserving information when a company has the legal obligation to do so. By understanding what statutes apply, you can more accurately define your document retention schedule.

Once the policy and procedures have been developed, the next step is employee training. In addition to mandatory training upon policy rollout, annual refreshers and social events sponsored by the retentions department should be held. Training should also be built into orientation so that new employees will ingrain the process from day one. It is important to have employees sign a compliance sheet following training to show that they have been trained and understand the records

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BROWARD SCENE

By: Judith Pawloski, CLM
Peterson Bernard

Our January meeting was hosted by Paula Lawson at the Fort Lauderdale offices of Genovese Joblove & Battista. Western Digitech & LifeSize sponsored the event and made a presentation on their video conferencing products. The technology these days is truly amazing! There were approx. 17 attendees at the luncheon.

The February luncheon was canceled and attendance was channeled toward the South Florida ALA Monthly meeting which was held on February 23, 2011 in Broward. For the first time, this event was held at the Broward County Bar Association. Paula Black delivered an eye opening and informative presentation on marketing. The event was "sold out" and the room was packed with attendees ranging from administrators, attorneys, paralegals, vendors and marketing specialists.

Leasing tips were the topic of discussion for the March meeting held on the 10th at Timpano's on Las Olas Boulevard.

Also in March was the ALA Vendor Expo and many Broward administrators made the drive and attended this annual event.

Continued from page 1 >

contingency fees (paid only when the firm wins a case or otherwise gets a favorable result for the client), performance-based fees and blended fees, which may be a combination of hourly rates and fixed fees. Some large national firms are also finding ways to deliver the same services at a lower price point. For example, even if a legal need originates in a high-cost location, such as New York City or Los Angeles, it's possible that some aspects of the client work can be transferred to legal staff in a smaller office that has lower operating costs and can deliver services more economically.

In addition to reviewing traditional billing models, some financial experts have recommended that law firms consider adopting certain best practices from the business world. These suggestions include hiring a non-lawyer executive with a business and financial background to introduce and manage financial controls, and demand prompt billing and timely collections. Other actions that may benefit law firms include creating a rainy-day capital fund in case of emergency or economic downturn, improving forecasting of profits and expenses as well as cash flow, and adopting more of an "accounting mindset" so firms can better monitor economic performance.

Modifying Compensation Structures

Also, some law offices are changing their compensation structures to better align them with the actual profitability of individual partners and associates. For example, some are modifying or doing away with the long-established practice of lockstep compensation (a system in which salary levels are based solely upon an employee's seniority within the firm) and adopting merit- or performance-based programs in which salaries, billing rates and promotions are based on mastery of predetermined competencies and skills.

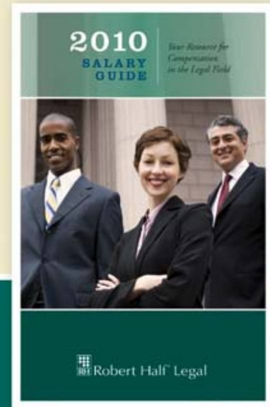
Another much-discussed issue in many firms is whether to move from the traditional "open" compensation structure for partners to a "closed" model. The latter approach – in which only a few select senior partners know how other partners are compensated – can give managing partners more flexibility to make hiring decisions that improve efficiencies and enhance practice area success. Firms also are reassessing what it takes to become a partner. They are recognizing that by reducing the number of equity partners who are not true business developers, they may be able to become more flexible and entrepreneurial.

Managing Relationships

In addition to looking inward to determine how they can operate more efficiently and deliver greater value to clients, the most progressive law firms are engaging clients in an active dialogue about how they can work together to meet each party's individual needs while improving service. In many cases, the relationship between law firm and corporate client is being redesigned to find highly customized billing and service solutions.

Although the global economic crisis has had an impact on virtually every law firm and legal department, it is not the root or sole cause of the changes some organizations are making in the way they operate. Many of the issues and challenges facing the legal industry were present well before the economic downturn and will continue to deserve attention moving forward. Those firms that see the current environment as an invitation to rethink old ways of working and introduce appropriate changes will emerge stronger and better positioned to anticipate and adapt to shifting business climates and client priorities.

Charles A. Volkert is executive director of Robert Half Legal, a leading staffing service specializing in the placement of attorneys, paralegals, legal administrators and other legal professionals with law firms and corporate legal departments. For a more detailed look at how the legal field is adapting to a changing environment, you can download a complimentary copy of the Robert Half Legal report, Future Law Office: Delivering Maximum Value in a Cost-Conscious Legal Era at www.roberthalflegal.com/futurelawoffice.



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retention policy. Additionally, internal resources such as an Intranet page citing policy details, and a contact to direct questions are advantageous to organizations. Companies should also provide a list of frequently asked questions including steps to take in the event of litigation and a quick reference guide to retention categories.

Beyond employee training, accountability for compliance policy must also be in place. This can be done by establishing an internal auditing team that conducts random audits. Audits should result in some sort of consequence such as a fine, or in severe circumstances of negligence, employee termination. Some industries such as banking require annual audits by federal regulators.

Records and Information Management Tools

From document storage, shredding and imaging services to tools for litigation hold tracking, there are numerous resources available to help organizations manage their records. Converting paper files and records to electronic documents can help increase productivity, improve business processes and ensure regulatory compliance. Document storage providers can save organizations space, time and money due to increased information security and faster document/information retrieval. Document shredding services help organizations implement a secure and compliant document destruction program which increases confidential business record security and reduces cost. Organizations should look for a provider that provides document imaging, storage and shredding solutions to help better meet an organization's growing information management needs. The provider should be PCI-DSS Compliant and AAA NAID certified to ensure the highest levels of security.

Records management is primarily concerned with the evidence of an organization's activities, and is usually applied to the value of the record rather than its physical format. Anything from a voicemail to a signed, printed contract can be considered a record, so it is important to develop a records retention program with the involvement of IT, records management and business leaders that is obvious and easy to implement. Since it can be very difficult to manage the entire process in today's digital age, having a solid plan in place and working with an outsourced document management provider will enable organizations to enjoy the peace of mind of a compliant, secure, records retention and information management program.

For more information, visit www.cintas.com/documentmanagement.

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Effective Transportation Management for Law Firms

By: Randy Ostrow, Coastal Car Worldwide

As a new Sponsor to the South Florida Chapter of ALA, I have had the privilege to speak with several of the Chapter's Board Members during the past couple of weeks. I was not sure what to expect and felt genuinely relieved to be so warmly welcomed by each and every person I met.

When evaluating transportation options for your attorneys and staff, here are a few key items to consider:

1. You should develop a policy for transportation expenses while traveling. The policy should state acceptable types of car service, reimbursement rules, approval processes, etc. Allowing your traveling employees to make their own decisions may result in the firm paying for large non-billable costs.

2. Car service expenses should be billed back to the client. However, if they aren't reconciled and/or submitted in real time, these charges often lag behind the other items such as airfare or hotel rooms. For example, the firm's client receives an invoice, which includes charges for car service or taxis but they are 30-90 days after the actual transportation. The client calls your office and asks, "why are these charges on a March invoice for something that happened back in January?" These scenarios usually result in write-downs or poor client relations. Make sure your car service provider can provide real-time billing solutions.

3. Look for a car service vendor who can provide multiple city coverage in order to simplify the process of booking travel arrangements. This will save your staff time and simplify billing.

4. Make sure your vendor has adequate liability coverage.

5. Finally, a quality car service offers reliability, safety and time savings that a taxi will not provide. Having a driver waiting vs. having them wait in a taxi line will make the road a bit more bearable for your frequent fliers.

So, consider streamlining your travel arrangements with a quality, full service transportation vendor. It can make life easier and more efficient for your firm when it comes to travel. I look forward to meeting everyone in the South Florida Chapter soon. I am excited to get to know you.

Randy Ostrow is the Vice President of Sales for Coastal Car Worldwide. *http://www.coastalcar.com*

Legal Expo March 16, 2011

On March 16th, the chapter held its annual Legal Expo at the Downtown Hyatt. Forty-eight companies showcased their services and products at this fun and informative event. Special thanks to Victoria Allen and her planning committee, Jackie Fleites, Grace Lopez, Claudia Hoffman, Tami Segal and Edna Rosen. Special thanks for Harvey Bilt Photography, a Bronze Business Partner, for capturing these images.

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Special thanks to our Bronze Business Partner, Harvey Bilt Photography, for capturing the images at our Legal Expo and taking great headshots of our members.

Look for more information about Harvey in upcoming issues.

Harvey Bilt Photography
www.biltphoto.com

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Calendar

April 14, 2011
Broward Lunch
Timpano's
Email RSVP

April 26, 2011
Monthly Member Luncheon
Speaker: Barbara Glanz,
Barbara Glanz
Communications
Topic: "Spreading
Contagious Enthusiasm-
Creating Workplaces
of Passion,
Purpose, and Productivity"
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May 12, 2011
Broward Lunch
Timpano's
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May 18, 2011
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May 22-25, 2011
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More information