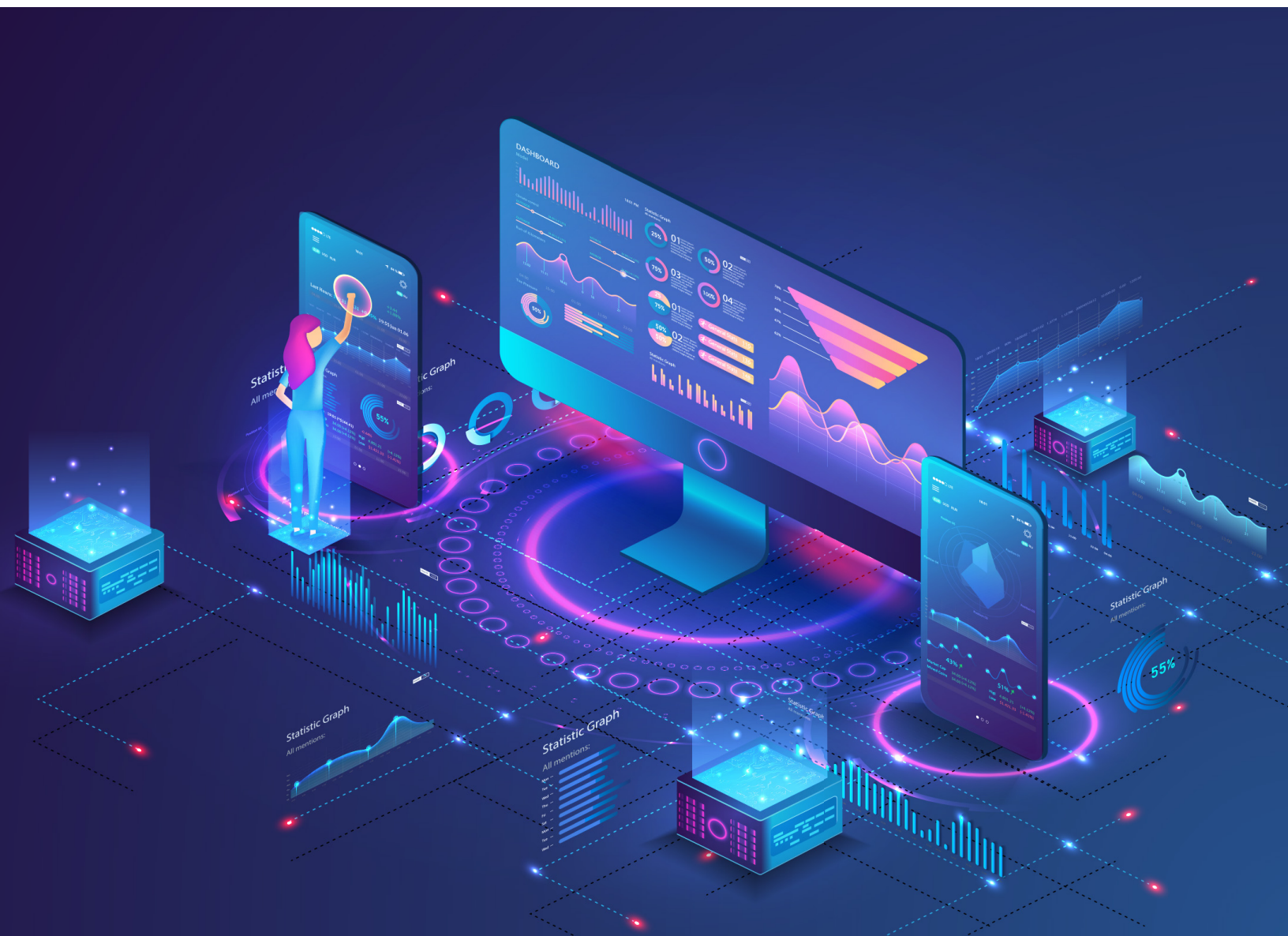


August / September 2022
Vol. 2022, No. 4

TECHNOLOGY



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**Technology in Our
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Document Lifecycle**

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ALAMN TEAMS & SIGs

ALAMN Teams serve as liaisons between membership and the respective director, representing the ALAMN Board of Directors.

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ALAMN SPECIAL INTEREST GROUPS (SIGs) are educational forums specific to functional specialty.

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If you are interested in serving as a co-chair for a Team or SIG, please contact Chong Lee (clee@fr.com, 612.204.4633).



ALA's Career Center is a place to find a variety of articles and resources to help you develop your skills and enhance your career. Check out the featured article from Robert Half, "2022 Forecast: In Demand Practice Areas and Jobs," found [HERE](#).

ALAMN ORGANIZATIONAL TABLE

BOARD OF DIRECTORS						
President: Chong Lee						
President Elect	Past President	Communications Director	Membership Director	Education Director	Administrative Director	Finance Director
Carrie Patton	Caitlin Niedzwiecki	Samantha Tschida	Sarah Duerschler	Gretchen Luessenheide	Pat Stender	Vanessa Kahn
SERVICE TEAMS						
(ALAMN Membership is required to participate; Regular ALAMN Membership is required to Chair; Service Teams work serves entire chapter)						
Business Partner Relations	Diversity, Equity, Inclusion & Access	Communications	Membership Development	General Meetings		Compensation & Benefits Survey
Deb O'Connor Kelly Thaemert	Stacy Locsin (Open Position)	Gayle Hildahl	(Open Position)	(Open Position)		Laurie Greenberg Laurie Percy
	Community Service			Education & Conference		
	Wendy Cornelius Pam Gerads			Catherine Gorr		
SECTION TEAMS (ALAMN Membership is required to participate; Regular ALAMN Membership is required to Chair; Section Teams work serves sub-section of chapter membership)						
		Branch Office	Large Firm Chief Officers	Small and Medium Firm	Human Resources	
		Jessica Johnson	Abby Rooney	Jeff Downes (Open Position)	Kim Motzko Josh Campion	
SPECIAL INTEREST GROUPS (Non-members may participate; Regular ALAMN Membership is required to Chair)						
Corporate & Government					Facilities Management	Financial Management
(Inactive)					Kim Motzko Katie Burns	Suzette Allaire Rebecca Doyle
St. Cloud					Intellectual Property (IP)	Pricing, Legal Project Management (LPM) & Knowledge Management (KM)
Ann Entenmann					Val Studer (Open Position)	
ADMINISTRATIVE VOLUNTEERS (Regular or Associate ALAMN Membership is required)						
Also serves as:	Also serves as:	Newsletter Editor	Emerging Leaders Group	CLM Study Group Coordinator	Staff & Member Placement Coordinator	
LPACC Liaison	Past President Liaison	Gretchen Luessenheide	Nick Manty	Tracy Overson Tracy Skjeveland	(HR) Laurie Greenberg	
ALA Region 3 Representative	Nominating Committee (chair)	Social Media		Bar Liason		
		Jaffe Management		Sarah Evenson		

PRESIDENT'S COLUMN

By Chong Lee, ALAMN President



Your ALAMN Board kicked off the second quarter with a hybrid Board meeting, Chapter Leadership Institute, and our summer social.

At the July Board meeting the Board selected winners for the following

scholarships:

- The Opportunity Scholarship is a scholarship for members who does not have funds available to support attendance at any ALA Conference.
- The First Time Attendee Scholarship is a scholarship for members who have not ever attended the ALA Annual Conference.
- The Outstanding Membership Scholarship is awarded per year to a regular member who has been nominated by a peer for outstanding service to the Association for attendance at any ALA Conference.

At our annual Summer Social the following scholarships were also randomly drawn and awarded to members in attendance at the social.

- The ALAMN Membership Scholarship
- The ALAMN Superior Business Partner Annual ALA Conference Scholarship
- The ALAMN Mille Lacs Business Partner Scholarship

These scholarships are made possible through our business partner sponsorships and help ALAMN's mission to advance the role of legal managers through education, sharing of knowledge and resources, and recognition of their contributions to the legal profession.

Chapter Leadership Institute (CLI) is a two-day conference for ALA chapters and leaders. This event is hosted annually by the current ALA president and board. This year CLI took place in Las Vegas and was hosted by our very own Sarah Evenson. Sarah and her

team did a phenomenal job of planning and executing the conference. We had the opportunity to network and share ideas with leaders from chapters all around the country. My key take-away from CLI is equity, inclusion, and accessibility. I am looking forward to discussing how we as a chapter can offer more equity, inclusion, and accessibility to our members as well as our community.

While July is now over, I am looking forward to our fall line-up, which includes the following activities and events:

- The Food Group on Tuesday, August 9, 2022 – for this community service event volunteers will primarily be assisting with warehouse project for The Food Group's "Fare For All" program. Participation is limited to 14 people. Members and business partners are welcomed.
- The September General Meeting on Tuesday, September 13, 2022 – this is our annual Compensation and Benefits Survey distribution and review meeting. Please check the website for registration information.
- The Annual ALAMN Education Conference on Tuesday, September 20, 2022 at the Golden Valley Country Club. This is an all-day education event open to all members and their colleagues.

Come network with your fellow administrators and meet our sponsors at one or all of these events. You never know when a colleague or a sponsor could come in handy!

ALAMN MASTER CALENDAR

ALAMN leadership has created a master calendar for 2022. This calendar includes the all-member events and special interest group meetings. Service team meetings are not included on the master calendar and will continue to be scheduled by service team chair(s). You will notice fewer events on the ALAMN master calendar. Our goal is to elevate the quality of and attract more attendees to each event.

Be sure to check out the Full Calendar on our ALAMN website for more details about upcoming meetings and events!

JANUARY	FEBRUARY	MARCH	APRIL
1/18 - Facilities 1/25 - Small/Medium	2/1 - HR 2/8 - General Meeting 1 2/17 - Finance 2/22 - Facilities 2/22 - Winter Mixer w/ BPs	3/1 - Community Service 3/8 - General Meeting 2 3/15 - Facilities 3/22 - Finance 3/24 - IP Leadership Orientation	4/12 - Small/Medium 4/19 - Facilities 4/26 - HR 4/28 - Foot in the Door Social
MAY	JUNE	JULY	AUGUST
5/10 - Finance 5/15 - 5/18 ALA National Conference 5/17 - Facilities	6/7 - IP 6/14 - General Meeting 3 6/16 - Large Firm Chief Officers 6/16 - Finance 6/21 - Small/Medium 6/21 - Facilities	7/19 - Finance 7/21 - ALAMN Summer Social 7/21 - Large Firm Chief Officers	8/2 - HR 8/18 - Large Firm Chief Officers 8/23 - Finance
SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
9/13 - Salary Survey Results 9/15 - Finance 9/15 - Large Firm Chief Officers 9/20 - Facilities 9/20 - ALAMN Education Conference	10/4 - HR 10/11 - Diversity & Inclusion Education Event 10/18 - Facilities 10/20 - Large Firm Chief Officers 10/27 - ALAMN Fall Social	11/8 - Law Firm Leaders Networking Event 11/17 - Small/Medium 11/17 - Large Firm Chief Officers	ALAMN Holiday Social 12/13 - IP 12/15 - Large Firm Chief Officers 12/20 - Facilities

ALAMN Has Adopted ALA's Mission Statement

ALA is the premier professional association connecting leaders and managers within the legal industry. We provide extensive professional development, collaborative peer communities, strategic operational solutions, and business partner connections empowering our members to lead the business of law.

ALAMN CALENDAR OF EVENTS

AUGUST

SU	MO	TU	WE	TH	FR	SA
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

SEPTEMBER

SU	MO	TU	WE	TH	FR	SA
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

AUGUST

- 2 HR Team Meeting**
12:00 – 1:00 pm
- 9 Community Service: The Food Group**
4:00 – 6:00 pm
The Food Group, New Hope
- 11 Branch Office SIG Meeting**
12:00 – 1:00 pm
- 18 Large Firm Chief Officers Meeting**
12:00 – 1:00 pm
- 23 Finance SIG Meeting**
12:00 – 1:00 pm

SEPTEMBER

- 13 General Meeting - Salary Survey**
12:00 – 1:00 pm
- 13 Emerging Leaders Happy Hour**
5:00 – 7:00 pm
Giulia, Minneapolis
- 15 Large Firm Chief Officers Meeting**
12:00 – 1:00 pm
- 20 ALAMN Education Conference**
8:00 am – 5:30 pm
- 21 Facilities SIG Meeting**
12:00 – 1:00 pm
- 27 Finance SIG Meeting**
12:00 – 1:00 pm

CHECK OUT THESE ARTICLES

Written by ALAMN members and featured in recent *Minnesota Lawyer* publications:

[Community, growth and so much more](#), by Laurie Greenberg, Stacy Locsin, and Jeff Downes

[ALAMN Involvement in the Community](#), by Tracy Smith



The Association of Legal Administrators has specially designed its events to advance the development of professionals from all walks of law. View the ALA Event Calendar [HERE](#).

THE “OFFICE TECHNOLOGY” CONVERSATION

By Claudett McCune, Coordinated Business Systems

In the song, “These are a Few of My Favorite Things,” we know the work copier would not be on the list. Hardcopy is still mandated in many sectors. Therefore, your office needs to have a device that will reliably and securely provide that document.

Herein lies the ultimate question: What should I look for in an office copier to avoid being cast in *Office Space*? It depends ... Just as you would interview a client before taking a case, there needs to be a conversation to find a best fit.

Each business prioritizes different functions of their office equipment. Here are some features to consider and topics for discussion at your next interview:

User-friendly: Would a mini-QWERTY keyboard be helpful vs. a standard, full touchscreen?

Browse: Choose the destination folder and name a document prior to scanning, eliminating another step in the need to “finish scanning” when back at your desk.

Automatically index utilizing 1D and 2D barcodes, for a multi-step process.

Finishing options: Do you use the staple, 2-hole punch, or 3-hole punch? Is the original staple cartridge from three years ago still in the finisher?

Security: Built-in, multi-layered security with encryption and features to erase data at the end of use; control over user activity, and security measures enabled to ensure information is irretrievable by unauthorized users.

Guest users may print jobs without joining private company Wi-Fi or the risk of someone inserting a potentially infected USB key into corporate PC or printer.

Give access to only specified users and track who views or edits a file, limit download rights, meaning that the risk of a document being unintentionally shared is reduced significantly.

Mobile print, copy, and scan: Do you need remote accessibility? Staff are no longer tied to the office desktop, and neither is printing. There is the capability to print, copy, and scan from your phone. While working from home, would you like to send a print job to the copier for the partner at the office?

Warm-up/wake speeds: Do you wait for what feels like 10 minutes for the device to print your document? Do you have humidity issues in the office to the degree that it causes paper jams? There are solutions to address these concerns.

Supply availability and replenishment: What is the availability and process to ensure that you never run out of supplies? Do you know when you are low?

Service: Being down for two days should not be acceptable. Are you calling locally for service? Where is the technician is coming from? How do you know that your request was received?

Intelligence: As a rule, printers are not intelligent. They do what they are told to do. Do you know what your document and print driver is telling the printer to do?

Inventory and integration: In recent history devices have advanced a tremendous amount. Often there is an integration of some kind in the background. Also, there is a high probability that if you order new equipment today, there may be a wait. The bottom line is that it is worth the wait to get the technology & security that your business needs.

Meet with different vendors, as it really can be different. Just as you would interview a client before taking a case, interview a vendor. Once you have had the conversation, it is perfectly acceptable to say no if it is not a good fit.

TECHNOLOGY IN OUR LAW FIRMS

By Carrie Patton



When anyone asks, “What is something you can’t live without?” the first thing that usually comes to mind is your family. The second is likely your friends. But, I bet you if you started to go down the list, technology would also be one

of those things you can’t live without. Technology is an essential part of our lives, and there is no way we could survive without it. Life without technology wouldn’t be functional or enjoyable for most of us. Just try grounding your teenager from electronics for a week, and you will see. It is likely just as much punishment for you as it is them.

Evolution in technology is around us every day both personally and professionally. From cassette tapes to the iPad Nano to the iPhone 13. I remember the day when we were given the opportunity at work to go from one monitor to two. I remember thinking, “What in the world would I need two monitors for?” Now I don’t even know how I would function without two monitors. Many of us learned the lessons of conveniences of technology in our office set up when we transitioned to home through the early stages of the COVID-19 pandemic. Some of us were fortunate enough to move from our work office to a just as functional home office. Others were forced to balance a laptop on their lap on the couch next to a 5-year-old trying to Zoom into their class for school.

This next generation of attorneys entering our firms will never know a world of Dictaphones and typewriters. They will be in our offices looking for new ways to get things done faster, smarter, and more efficiently. If we don’t grow with the technology advances with the next generation, we will be left in the dust. Don’t let technology scare you, as it is not scared of you.

As law firm leaders, supporting our firms as they invest in technology is critical. A strong technology platform is every business’ competitive edge as well as critical necessity. It is almost impossible not to read a headline

about a data breach or an information security ransom scenario on a regular basis. Our good friends in our IT departments work hard to teach us about malware and phishing attacks and all the other stupid things that we can do to put our firms at risks. The least we can do is listen and follow instructions. How embarrassing would it be to be the one who brings in a virus that crashes the system?

ALAMN is proud to have relationships with several technology related business partners who offer solutions to help your firm. Check them out by visiting our [business partner page](#) on ALAMN’s web page and visit them at their booths at the ALAMN Annual Conference and Expo on September 20, 2022 at Golden Valley Country Club.



MODERNIZE YOUR FIRM WITH PROACTIVE MANAGED IT

- Work more effectively whether in the office or remote
- Rest easy knowing you’re protected from cyber attacks
- Eliminate IT surprises by ensuring you have the right technology to support your practice



thriveon.net/grow

2022 ALAMN EDUCATION CONFERENCE

<p>9/20/2022 8:00am – 5:30pm</p>		<p>Golden Valley Country Club Golden Valley, MN</p>
<p>SHARI HARLEY</p>		<p>TONY DREES</p>




KEYNOTES

We are thrilled to announce details about the 32nd Annual Education Conference taking place on September 20, 2022, at the Golden Valley Country Club. This will be an all-day event with keynote speakers, multiple breakout sessions, an exhibit hall for our business partners and many opportunities to network and connect with your **ALAMN** colleagues.

Golden Valley Country Club is conveniently located close to downtown Minneapolis and has ample surface parking for members and business partners. It is a large facility with all meeting rooms located on the same floor, and all of the business partners will exhibit in one large ballroom.

Our day will kick off with keynote speaker, Shari Harley. Shari has presented at many ALA events, delivering a high-energy session on effective communication with our employees. This is even more important now with today's hybrid work environment.

We are extremely excited for our afternoon/lunch keynote speaker, Anthony Drees. He has an inspiring journey to share as a veteran amputee who lives by his rules of "No Lies. No Excuses. Never Quit." Tony's background as a U.S. Army Purple Heart Amputee, former Executive Director of Veterans Passport to Hope, and presently an adaptive champion and motivational speaker, makes Tony uniquely qualified to share his life story with audiences across all walks of life.

Our breakout sessions will include presentations from our Superior Sponsor, Alerus, and our Mille Lacs Sponsor, Affinity Consulting. Additionally, Tony Drees will give a second presentation, and local attorney Sybil Dunlop of Greene Espel will speak on diversity, equity, and inclusion in law firms. Sybil is a nationally recognized DEI speaker and will share her insights on this very important and timely topic.

[continued on page 13]

2022 ALAMN EDUCATION CONFERENCE - CONTINUED

As always, ALAMN members will have ample time to network and connect with each other and our very important business partner sponsors. The conference team is also working on selecting a community service project we can all support. We will gather at the end of

the day for a happy hour to celebrate the opportunity to be in person again and share what we learned throughout the day.

Look for registration details to be available soon.

PLEASE WELCOME OUR NEWEST ALAMN MEMBERS

Michele Juneau

HR Generalist

Mueting Raasch Group

Kelly Burns

Firm Administrator

Burns & Hansen, PA

Sarah Ptacek

Human Resources Manager

Henson & Efron

Justice Krumwiede

Office Coordinator

Stoel Rives LLP

Josh Naumann

Firm Administrator

Gislason & Hunter LLP

Jacqueline Blackwood

Retention & Compliance

Supervisor

Fish & Richardson

Chad Roberts

Senior Transfers Supervisor

Fish & Richardson

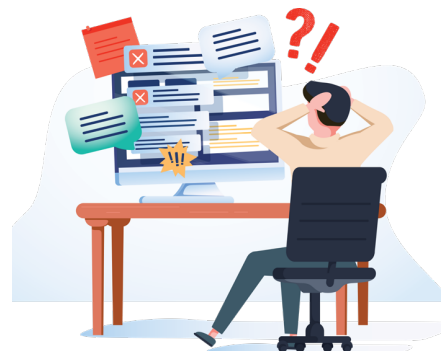
Ashton Batchelor

Director of LPM & Client

Experience

Robins Kaplan LLP

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PEOPLE-BASED SERVICES • COPIERS & PRINTERS • VOICE

ALAMN COMMUNITY SERVICES TEAM – CAPI

On Tuesday, May 24, 2022, a small (yet mighty) group of ALAMN members volunteered at CAPI in Brooklyn Park, MN and assisted with bagging rice and restocking the shelves in preparation for clients.

CAPI helps immigrants, refugees, and US-born people of color connect with the resources they need to build established, happy lives. The system can be complicated and confusing, and CAPI is available to make things simpler and to help every individual in the community thrive. For some this may be greater food security through CAPI's food shelf; for others, it may be securing health insurance through MNSure assistance. Some may need assistance with job skills development and/or training, while others may need assistance with navigating the home buying process. CAPI helps to eliminate barriers by assisting and connecting everyone with what they need on any given day.

Thank you to the volunteers:

- Pam Gerads
Merchant & Gould, P.C.
- Terri Stewart
Felhaber Larson
- Wendy Jo Cornelius
Metropolitan Airports Commission



ALAMN'S SHINING STARS - LAURIE GREENBERG AND LAURIE PEARCY

The ALAMN Board is pleased to announce that the co-chairs of the Compensation & Benefits Survey Service Team - Laurie Percy and Laurie Greenberg have been selected as Shining Stars for the Minnesota Chapter!

Together they lead the Service Team that provides valuable information for all who participate in the annual Compensation & Benefits Survey, and separately, they are pretty amazing, too!

Laurie Percy has been the Director of Administration at Bassford Remele for 15 years. Prior to joining Bassford, Laurie worked in law firms in Connecticut and New Orleans, where she was President of the New Orleans Chapter. She has been in law firm administration for 30+ years.

Laurie recently joined the Diversity, Equity, Inclusion, and Access (DEIA) Team, is a member of the Business Partner Relations Team (BPRT), has worked on various socials, including the July 2022 Summer Social, has been a member of the Education Committee and Conference Planning Committee, and also volunteers in Community Service projects.

Laurie said in the roles we fill in our firms, it can be somewhat of an isolating position, and she credits the peer-to-peer support, networking, social connections, education, listservs, feedback from others in similar roles, conferences, etc., for the longevity of her career.

A few of Laurie Percy's favorites and/or recommendations:

Local Restaurant – Revival in South Minneapolis and Black Sheep Pizza in the North Loop.
Travel and Favorite Vacation – Laurie and her husband make regular trips to Delaware and New Orleans, where they have family. Their favorite vacation was the two weeks she and her husband spent in Hawaii this spring, "Maui was fabulous!"
Dream Travel Destination – Three to four weeks exploring Italy!
Must See TV! – Laurie is a 48-year long watcher of General Hospital!
Favorite Beverage – Pinot Noir
Recently Read and Recommends – *Where the Crawdads Sing* by Delia Owens.
Final Fun Fact – Laurie reads at least one book per week and is ahead of schedule this year, having read 35 books as of July 15!

Laurie Greenberg is the Human Resources Director at Taft, Stettinius & Hollister (fka Briggs & Morgan) where she has worked for 32 years.

In addition to co-chairing the Compensation & Benefits Survey Service Team, Laurie has served on the Board of Directors as the Administrative Director and Communications Director, and has co-chaired the Community Services and Human Services Section Teams. Laurie serves as an Administrative Volunteer in the role of Staff and Member Placement Coordinator, posting jobs on the ALAMN website. She volunteers for community service projects and recently co-wrote an article to be published in an upcoming issue of *Minnesota Lawyer*.

When asked about the benefits of participating in ALA/ALAMN, Laurie said, "Having a venue to connect with peers is invaluable, a place to bounce ideas off others and hear what other people in similar positions are doing in our industry. While education and resources are important, at the end of the day, it's about the people."

For those considering a leadership role in ALAMN, Laurie says, "Bring your unique talents to our organization! Say yes! Just do it!"

Laurie's suggestions/favorites/recommendations:

Favorite Local Restaurant – Mancini's Char House in St. Paul
Favorite Beverage – Coke Zero and Diet Coke
Exercise/Activity – Running and Walking
Weekend Activities – Gardening and anything outdoors
Binge-Worthy TV – *Yellowstone*, *Bridgerton 2*, *Game of Thrones* (looking forward to the *Game of Thrones* prequel)
Bucket List Vacation Destination – Italy (30th wedding anniversary trip!)
Up Next to Read – *Where the Crawdads Sing* by Delia Owens

Please join the Board in thanking Laurie Percy and Laurie Greenberg for their individual contributions as well as their teamwork as co-chairs of the Compensation & Benefits Survey Service Team. We appreciate your commitment to ALAMN and ALA.

ALA DIVERSITY, EQUITY, INCLUSION AND ACCESSIBILITY STATEMENT

ALAMN's focus on Diversity, Equity, Inclusion and Accessibility (DEIA) align with the National Chapter of ALA. Therefore, ALAMN has adopted the Diversity Statement of ALA as updated June of 2022.

The Association of Legal Administrators (ALA) fosters an inclusive environment and recognizes diversity's power to strengthen the organization through collaboration that values our talents, skills and experiences. Our mission is to empower legal management professionals to lead the business of law by advocating for diversity initiatives that provide an environment of equity, inclusivity and accessibility to everyone.

As emerging thought leaders in diversity, equity, inclusion and accessibility, we encourage conversations about, acceptance of and a focus on these issues throughout the legal community. While we may not have all the answers, we strive to keep listening to better expand our empathy and knowledge.

ALA commits to provide:

- Programs, resources, products and services that are accessible to everyone.
- Equitable hiring to ensure employment practices and policies serve to counteract unconscious biases.
- Encouragement for every individual to bring their authentic self to the table so we can acknowledge, confront and remedy any decisions or behaviors inconsistent with our mission.
- Building trust through open and honest communication based on mutual respect.
- Measuring and transparently reporting results on our progress in these commitments and our mission.

How We Currently Define Diversity, Equity, Inclusion and Accessibility

Diversity recognizes, respects and values differences based on gender, race, skin color, ethnicity, national origin, age, religion, physical ability and sexual orientation. This also encompasses an infinite range of individual characteristics and experiences, such as communication style, career path, educational background, geographic location, income level, military experience, marital status, parental status and other variables that influence personal perspectives.

Equity eliminates barriers to fair treatment for underrepresented groups through systemic changes. Creating fair access, opportunity and advancement promotes the representation and participation of different groups of individuals.

Inclusion efforts aim to create a welcoming environment for everyone. Successful inclusion programs proactively identify and remove the barriers that impede the success of everyone, including those historically underrepresented in the legal industry, and foster a culture of respect and belonging.

Accessibility emphasizes the importance of improving the degree to which an environment, information, or product or service can be obtained. It ensures a level playing field for people by addressing physical and nonphysical barriers.

We want you to see and feel our commitment to diversity in everything we do.

UNDERSTANDING YOUR DOCUMENT LIFECYCLE

By Karen Scher, Affinity Consulting Group

Safely and effectively managing all the documents associated with running a law firm requires more than just storing and tagging them. Documents in a law firm have their own lifecycle that involves valuable intellectual property (IP), handoffs, collaboration, versioning, and a host of storage and access considerations.

Properly managing your document lifecycle helps you to minimize risk and ensure compliance with regulatory requirements. And bringing a critical eye to each stage of this lifecycle often reveals an opportunity to either gain more efficiency or improve the quality of your work product.

Phase 1: Document Creation

Before documents are filed away in your document management system, they're created—sometimes from scratch, but more often from a similar, previously created document containing your highly valuable IP. While this document “cloning” process is common, it's highly error-prone and inefficient.

Automating your document creation process not only saves you time and improves your document quality; it also makes it easier for you to onboard new employees, helps you better leverage your IP, and could even help you move to value-based billing.

Phase 2: Classification and Storage

The key questions in this stage of the document lifecycle are: “What is this document? And how do we classify it in order to ensure that we can easily access it later?” This is where your document management system (DMS) shines, offering a secure repository for your documents, version control, and the ability to organize and/or tag them in such a way as to ensure retrievability on a moment's notice.

Phase 3: Sharing and Delivery

At this phase of the document lifecycle, the document is active and is fulfilling its purpose. Your firm may distribute it internally, send it externally, or store it in

your DMS. Let's look deeper into sharing your document internally and externally.

Internal workflow. Once someone creates a document, it may go through various stages internally for further collaboration, such as an editing process, review by multiple parties or departments, or an approval process. Access control and permissions functionality are key for this stage in the life cycle. For instance, a new client contract may require input from accounting or management before you can send it to the client.

External delivery and tracking. Many firms create documents solely for internal use and never share them outside the organization. However, if someone creates a document to send to an external party, such as a client contract, they will need to send it to the appropriate party and track it to ensure it meets the objective. An e-signature solution can be useful at this stage of the life cycle.

Phase 4: Archival and Destruction

Most documents have a limited active life. Once a document has achieved its objective or a newer version or document supersedes it, the document becomes inactive. It will then need to go into secure storage for whatever time period is appropriate.

To reduce clutter and protect sensitive data, it's important to securely archive or destroy inactive documents. Document management systems ensure you can methodically and securely archive documents.

By connecting your firm's various tools and daily workflows with the entire document life cycle in mind, you can ensure your document-related processes are as efficient and complete as possible — saving time, avoiding redundancies, and enhancing security.

If you're interested in learning more about document lifecycle efficiency for your law firm or legal department, just reach out to Affinity by visiting www.affinityconsulting.com or by calling 877-676-5492.

CYBERSECURITY: WAYS TO PROTECT YOUR FIRM & YOUR CLIENTS' SENSITIVE DATA

By Wayne Marino, Ivionics

Law Firms around the world have been affected by data breaches and cybersecurity issues. Media reports and online discussions have documented the dangers of being attacked. In response to the growing risk of becoming a target for a cyber-attack, law firms should be reviewing and updating their security technology solutions and planning. Here you will learn why law firms are attacked and the key steps that can be taken to mitigate the risk of it happening.

CYBERSECURITY IMPORTANCE FOR LAW FIRMS

In the United States, security breach notification laws require firms and businesses to inform affected parties when their personal or business information has been compromised. The storage of sensitive data and the transfer of funds make law firms prime targets for cyber-attacks. These are opportunities for attackers to steal and sell data. They succeed because most law firms lack proper monitoring and detection systems or the latest security solutions to stop the bad actors' latest attacks. Additionally, employees are not properly trained to diagnose security risks.

ADDRESSING THE RISKS

Since cybersecurity risks are not part of the everyday practice of law firms, they are often overlooked or assumed to be in place as it was addressed just last year. Understanding your firm's security risks is crucial, as is understanding that those risks are always changing, and firms need to change with the new risks. A firm's cyber defense should consist of these six key components:

1. Partner with an MSSP - MSSP professionals work with firms to ensure that they are secure, making good judgment decisions in their everyday work practices, and informing them of the latest in security practices. There is no out-of-the-box solution for security; it has to be tailored to each firm. The MSSP can identify the risks and implement controls to prevent infiltration and leakage of a firm's data and systems.

2. Endpoint Detection and Response (EDR)

Solution - Using EDR solutions, law firms can record all activity from employee workstations, laptops, and phones. Data is analyzed to detect suspicious behavior, an alert is sent, malicious activity is blocked, and remediation suggestions are given to restore the systems.

3. Managed Detection and Response (MDR)

Solution - MDR solutions provide security and monitoring for all endpoints within the organization. This includes monitoring client endpoints, networks, and any additional security event programs they are using. As a result, attacks can be prevented before they occur.

4. Security Information Event Management (SIEM)

- SIEM systems can detect threats and security compliance. When a security incident occurs, the system alerts and locks down the affected areas. SIEM systems record all data so you can see when an incident occurred. It saves firms time from searching multiple systems to see when it happened.

5. Vulnerability Management System

- Vulnerability Management Systems protect software programs and environments from viruses, malware, and cyber-attacks. The term malware refers to software that attacks computers, servers, clients, or networks within a law firm. Vulnerability Management Systems can uncover risks and exposures you didn't know existed.

6. Application Whitelisting Service

- Application Whitelisting Service indexes only "approved" software and executable files. It can also help prevent zero-party data incidents from occurring. Zero-party data refers to information that clients or employees intentionally share with you.

It is important to stay safe, aware, and proactive. When a cyber-attack is successful, the costs and remediation can be high. Firms can benefit by understanding the risks, implementing a security plan, and instituting it into their daily practices.

BUSINESS PARTNER SPOTLIGHT: JOHN FRISVOLD

RETIREMENT SALES CONSULTANT, ALERUS



John Frisvold has worked in the financial industry, specializing in retirement plan services, for more than 15 years. He joined Alerus in February 2020 as a retirement sales consultant, where he works closely with financial advisors and plan sponsors to deliver retirement plan solutions to their

clients and employees.

John holds bachelor's degrees in mathematics and actuarial science from Drake University in Des Moines, Iowa. He and his wife, Sally, live in Golden Valley, Minnesota, with their two dogs.

How long have you been involved with ALAMN?

I'm proud to have been involved with ALAMN since 2010. I enjoy working with and supporting professionals in the legal industry.

What is your favorite tv show?

*M*A*S*H!* I am probably the only 38-year-old to answer that, but I like what I like! I fell in love with the show as a kid, when we lived in the middle of nowhere and had limited television show options. I will admit I recently rewatched it on Hulu and realized how dated the jokes were. Yikes! If I had to choose a more modern show, I would probably pick *Cheers* or *Frasier*.

What is the last vacation you took?

We visited Kauai, Hawaii in January. It was our second trip there in a year – love it there!

What is your favorite weekend activity?

Relaxing.

What is your favorite way to pass 30 minutes of free time?

I am a firm believer in the power of naps.

If you could learn to do anything, what would it be?

A second language. My first choice is French because one of my best friends is a native French speaker, and I could practice. Also, I would love to go to Africa someday, and French is a common language there.

At what age did you become an adult (in your opinion)?

I'll let you know when I get there!

BUSINESS PARTNER SPOTLIGHT: DAN ARNTSEN

CLIENT RELATIONSHIP MANAGER, AFFINITY CONSULTING GROUP



Dan proudly provides “white glove” service to all of our clients. He works with clients to understand their current needs and issues, and makes suggestions to resolve those needs and issues. His role is to build and maintain relationships with all of our clients. Dan has

worked with law firms since 1995, providing operations support and sales and marketing support. Since he frequently worked with default attorneys, he got to know Affinity’s Erica Fujimoto and Debbie Foster at various conferences. Dan really wanted to get into the technology side of things, so he started talking to Affinity about five years ago, and eventually made his way here.

Dan’s superpower is building relationships. Traveling and meeting face-to-face with clients are his favorite parts of his job.

You can reach Dan at:

Office: 708 -286-5014 | Cell: 608-234-8145

darntsen@affinityconsulting.com

How long have you been involved with ALAMN?

With ALA?

Just a few months with the ALAMN group but for over three years with the ALA

What is your favorite tv show this year?

Home Economics

What is the last vacation you took?

Destin, FL

What is your favorite weekend activity?

Kayaking during the day and a bonfire at night

What is your favorite way to pass 30 minutes of free time?

Doing a puzzle on my phone

If you could learn to do anything, what would it be?

Karate

At what age did you become an adult (in your opinion)?

Adulting is no fun so I do it part-time when needed otherwise I remain a kid at heart



LOFTY GOALS
NEED SMART
ADVICE.



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PRACTICE ANALYSIS

Transform your firm.

Step 1: GAIN CLARITY

Positive change starts with absolute clarity.

Step 2: GET INSIGHT

Leverage the power of perspective to change the way you think about your firm's future.

Step 3: DEVELOP YOUR ROADMAP

Finally understand where you're going and how to get there.



Unlock your potential.

