the Verdict

ALAMN
A Chapter of the Association of Legal Administrators

April / May 2017
Vol. 2017, No. 2

DON'T MISS:

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ALA**MN** has adopted ALA's Mission Statement

To improve the quality of management in legal services organizations; promote and enhance the competence and professionalism of legal administrators and all members of the management team; and represent professional legal management and managers to the legal community and to the community at large.

2017 - 2018 ALAMN COMMITTEES & SIGs

ALAMN **COMMITTEES** serve as liaisons between membership and the respective director, representing the ALA**MN** Board of Directors.

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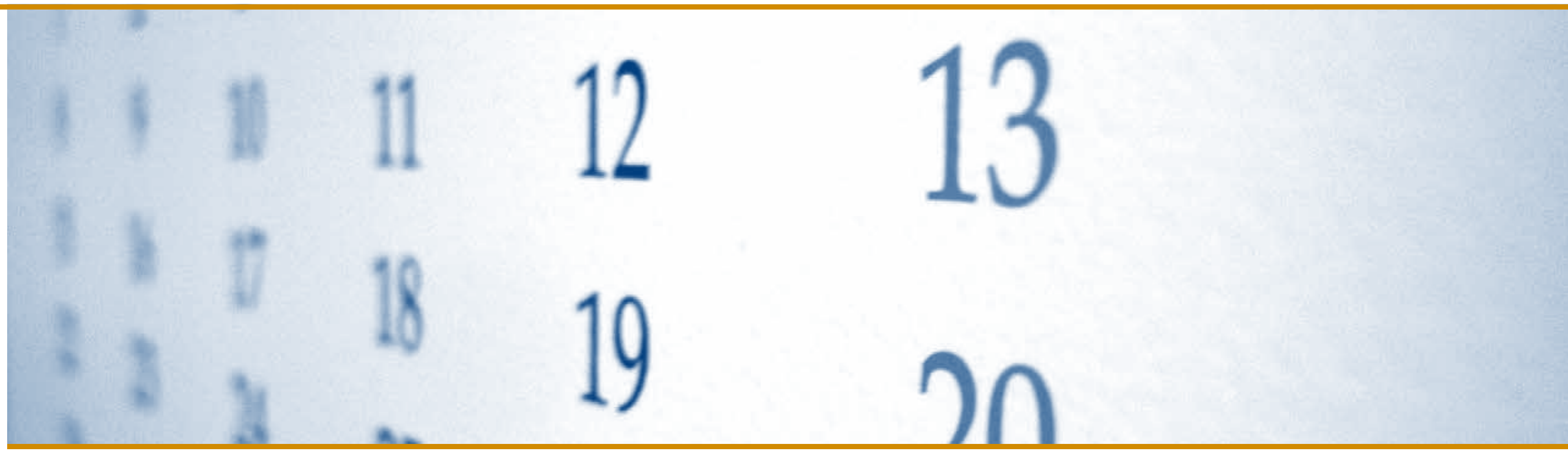
ALAMN CALENDAR OF EVENTS



APRIL 2017

SU	MO	TU	WE	TH	FR	SA
26	27	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	2	3	4	5	6

***PLEASE NOTE:**
SPECIAL INTEREST GROUP (SIG) attendees need not be ALAMN members

MAY 2017

SU	MO	TU	WE	TH	FR	SA
26	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

APRIL

2-5 ALA Annual Conference & Expo
Location: Colorado Convention Center
Denver, Colorado

6 Building Revenue: Unleashing the Power of Women to Develop Business
2:00 p.m.
Location: Zimmerman Reed

12 Large Firm Administrators
12:00 p.m.
Location: Winthrop & Weinstine

14 Board Meeting
8:30 a.m.
Location: Barnes and Thornburg

14 Diversity & Inclusion Committee's 3rd Annual Career Fair
9:00 a.m.
Location: Fredrikson & Byron, P.A.

18 Facilities SIG
12:00 p.m.
Location: Maslon Law Firm

19 Reimagining Your Approach to Performance Reviews
2:00 p.m.
Location: Zimmerman Reed

20 Silver Sponsor Social
4:30 p.m.
Location: The Local

25 The New Wage & Hour Compliance Requirements. Is Your Law Firm Well Positioned?
2:00 p.m.
Location: Zimmerman Reed

29 March of Dimes Walkathon
6:30 a.m.
Location: Mall of America

MAY

2 HR Committee Meeting
11:30 a.m.
Location: Arthur Chapman

4 Why and How to Outsource Your IT Support
2:00 p.m.
Location: Zimmerman Reed

9 General Meeting
11:30 a.m.
Location: Stinson Leonard Street

9 Building a Culture of Employee Engagement in Government
2:00 p.m.
Location: Zimmerman Reed

10 Cookie Cart Community Service Project
4:00 p.m.
Location: Cookie Cart

11 Finance SIG
12:00 p.m.
Location: TBD

12 Board Meeting
8:30 a.m.
Location: Barnes and Thornburg

16 Facilities SIG
12:00 p.m.
Location: Nilan Johnson Lewis, PA

17 Community Service Committee Meeting
11:30 a.m.
Location: Zimmerman Reed

17 Three Ways Performance Management is Changing in 2017
2:00 p.m.
Location: Zimmerman Reed

FROM THE PRESIDENT OF ALAMN

*By Sarah Didrikson, ALA**MN** Past President*

"Appreciation is a wonderful thing; it makes what is excellent in others belong to us as well."

- Francois-Marie Arouet de Voltaire

If you have worked with me you would know I love quotes. I post a new quote in my firm's kitchen each week. Quotes have an amazing way to get people energized, motivated, or inspired to do something more. When I saw the quote above I thought it would be the perfect way to kick-off my president's column, as I am bursting with appreciation as I start my position as President. Before anything else I want to express my heartfelt appreciation for the opportunity you have afforded me. When I first joined the ALA**MN** after practicing law for almost a decade, I had no idea the impact that this organization would have on my future. The relationships I have developed and the amazing opportunities that have come my way would not have happened but for my participation in this organization. Over the next year I will make every effort to continue to grow the ALA**MN** and ensure its positive impact not only on its members, but also our business partners and community.

It is the efforts and energy of many that make the ALA**MN** such a great organization. As such, I would like to acknowledge the contributions of the members of our Board of Directors who are stepping down from their positions. **Kathy Hubbard** has literally done it all for the ALA**MN**. If there is a committee that needs helps, Kathy is the first to volunteer. The amount of time and energy Kathy has given of herself for our organization is astounding. Additionally, Kathy was integral in the creation of our award winning Diversity and Inclusion High School Job Fair, which will celebrate its 3rd anniversary this year. While acting as president, she always went out of her way to include others and supported our members both professionally and personally. The ALA**MN** owes Kathy much for all that she has done, and continues to do, for our organization. **Terri Stewart** served as the Director of Education for the ALA**MN** this past year. Having been a member of the ALA**MN** since 2003 and actively involved in a number of other committee positions over the years, Terri brought well-rounded perspective to the Board and the Education Committee. She worked hard this past year to highlight our own members by giving them an opportunity to share their knowledge and experience with others at our general meetings. Terri's positive impact on our education offerings will be felt for years to come.

With change comes great opportunity. Joining the ALA**MN** Board of Directors are three new leaders who have already made their mark in the association in their own unique way. **Kelly Thaemert, Adam Barvels**, and **Jessica Gerhardson** will be taking on the Administrative, Education, and Membership director roles for 2017/2018. A special thank you to each of you for your willingness to share your talents and expertise with all of us.

It is our excellent members who make the ALA**MN** an exceptional organization. Your excellence is our excellence! Find a way to share your excellence with others and spread the appreciation.

2017 ALAMN BUSINESS PARTNER SPONSORS

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Alerus Financial
Marco Technologies, LLC

SILVER

Associated Private Client Services
Fluid Interiors
Innovative Office Solutions
LexisNexis
Loffler Companies Inc.
Marsh & McLennan Agency LLC
Ricoh USA, Inc.
Wells Fargo Bank N.A.

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Berry Coffee Company
BigHand
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DTI
Element Technologies
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Greiner Construction
Hays Companies
Henricksen
IST Management
Lurie LLP
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Northland Business Systems Inc.
Olsen Thielen & Co, Ltd.
Parameters
Payroll Direct, Inc.
ProCirrus Technologies
PROSHRED Minnesota
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Robert Half Legal
RSM US LLP
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TechFactory, LLC
Thomson Reuters
UPS
US Bank Equipment Finance
Verus Corporation
Western Bank
Windstream
Whizkids Tech
Willis Towers Watson

BRASS

ABA Retirement Funds Program
ALPS
AVI Systems
Compliance Discovery Solutions
Echelon Fine Printing
Staples Advantage
Studio Hive Inc.

ALAMN MEMBER ANNOUNCEMENTS

PLEASE WELCOME THE FOLLOWING NEW ALAMN MEMBERS:

Brian Sorlie
Accounting Manager
Monroe Moxness Berg PA

Carin Del Fiacco
HR Generalist
Moss & Barnett, PA

Samantha Rupert
Practice Manager
Shumaker & Sieffert, PA

Jessica Wolf
Office Manager
Pfefferle Kane, LLP

Kim Brown
Regional Manager
Hinshaw & Culbertson, LLP

Bonnie Korte
Manager of Patent Practice Systems Solutions
Fish & Richardson, PC

FINANCIAL SIG GROUP MEETING

The Financial SIG Group met on Thursday, March 9th, at McGrann Shea Carnival Straughn & Lamb, Chartered. Isaiah Campbell hosted the meeting, which was held as a round table discussion. Topics included discussions on payroll processing software and conversions, credit card processing vendors and best practices, Westlaw and Lexis products, and best practices for handling cash deposits.

The group plans to have a Happy Hour in April to celebrate the end of tax season. The next regular meeting will be held on May 11. The locations for the April and May meetings will be announced at a later date.

LARGE FIRM SIG MEETING

The Large Firm Administrators group met on March 1 at Zelle with six members in attendance. We heard an update from a recent successful lawyer retreat with some key lessons learned. Things that worked well included tailored marketing materials and business events balanced with social activities. Spouses and significant others participated in the weekend retreat creating a dynamic of even larger buy-in for the firm. This presentation led to a broader discussion of how to engage lawyers in both the business of the firm as well as the culture of the firm. Another topic of discussion focused on the best practices of lawyer timekeeping. Several firms have migrated to daily or weekly time entry versus monthly submissions to the finance department. One firm is focused on daily time entry with excellent results, and another firm recently moved to required weekly time entry with quick adaptation by most. We discussed the best ways to motivate lawyers to have more contemporaneous time entry, including use of mobile devices and positive reinforcement. There was a discussion of whether penalties for missing time entry motivates lawyers to change their habits, with the conclusion that in most instances they do not work. The next meeting will be held at Merchant & Gould on April 12.

2017 CONFERENCE AND EXPO RECAP

The ALA**MN** 27th Educational Conference & Exposition on March 7, 2017 was another great success. We had over 90 members and guests attend and 58 Business Partners put on an excellent exposition with many of them embracing the theme of "Waves of Change, Oceans of Opportunities." The keynote speaker and educational breakout sessions where all top notch. The venue stayed the same as last year at the Hyatt Regency Downtown Minneapolis. A big thank you to all the members on the BPCC who helped put this together. Below are the winners from the various contests throughout the day and their prizes.

Best Booth Contest

1st - Emergent Networks LLC

2nd - Loffler Companies

3rd - Marco Technologies, LLC

Honorable Mention - Payroll Direct

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2017 CONFERENCE AND EXPO RECAP

Prize Card

Platinum Sponsor	**Gift**	**Winner**
Emergent Networks LLC	Ipad Pro, Ipad Keyboard, Ipad Pro Pencil	Tracy Johnson
Gold Sponsor		
Alerus	Amazon Echo	Michele Brauch
Marco, Inc.	Swiss Army Backpack, Yeti Tumbler, RTIC Koozie	Terri Stewart
Silver Sponsor		
Fluid Interiors	Margarita Basket	Mary Laschansky
Innovative Office Solutions	$150.00 gift certificate to Oceanaire	Lee Hawks
Loffler Companies Inc.	2 Lexus Courtside Seats -Timberwolves vs Sacramento	Barbara Romanko
Marsh & McLennan Agency LLC	Amazon Kindle Fire Tablet	Norma Thayer
	Fitbit Charge 2	Kathy Hubbard
	One Hour of Wellness Consulting	Colette Canniff
Ricoh USA	Ricoh Handheld HD/3D DLP Projector	Jodi Schmidt
Copper Sponsor		
Affinity Consulting Group	Surfboard	Sarah Didrikson
ALL-STATE LEGAL	$50 AMEX Gift Certificate	Ellen Drasin
Beacon Hill Legal	$50 Juut gift card and Flower Arrangements	Pamela Gerads
Berry Coffee Company	1-B-140 Commercial Home Keurig w/Product.	Neil Simmons
	Two MN Twins tickets for the front row dugout.	Laurie Greenberg
	Two MN Twins tickets for the front row dugout.	Wayne Honeyman
BigHand, Inc.	Gift Card - $100	Janelle Loven
Bremer Bank	$50.00 Bremer Bank Gift Card	Lee Childers
Business Essentials	$100 Capital Grille Gift Card	Courtney Kurkowski
Canon Business Process Services	Amazon Gift Card	Phil Rush
ClientPay	$200 Visa Gift Card	Chong Lee
Consolidated Communications	Bluetooth Speaker w/wireless charger/CCI prize pack	Jim Schroeder
Depo International	Amazon Echo	Mary Eiden
DTI	Aveda Spa gift certificate	Jessica Johnson
Element Technologies	$150 Manny's Steakhouse Gift Card	Pat Stender
First Choice Services	Jim & Mary NO DRINK TICKETS Coffee Gift Basket	Josh Wolff
FRSecure LLC	Wine Gift Basket ($100 Value)	Darlene Downs
Greiner Construction	Samsung TV	Rob Rietschel
Hays Companies	Theatre Tickets	Catherine Gorr
IST Management Services, Inc.	$100 American Express Gift Card	Craig Solum
Minnesota Lawyers Mutual Insurance	$200 Manny's Gift Card	Wendy Cornelius
Payroll Direct, Inc.	Bose Wireless Speaker with carrying case	Patti Ploehn
PROSHRED Minnesota	Two lower level center ice tickets to Wild vs. Senators, 3/30	Mark Brauch
Rippe & Kingston	$100 American Express gift card	Tracy Smith
Robert Half Legal	$100 Amazon Gift Card	Greta Larson
SUCCESS Computer Consulting, Inc.	Samsung Galaxy Tablet	Sheila Johnson
US Bank Equipment Finance	$100 Visa Gift Card	Sheila Guzik
Verus Corporation	Syma X5C Explorers Gyro RC Quadcopter with HD Camera	Mika Kieffer
Whizkids Tech	Amazon Echo	Curt Okerson
Windstream	Amazon Echo	Tracey Grill

COMMUNITY SERVICES COMMITTEE – SIMPSON SHELTER MEAL WRAP-UP

Thank you to the following volunteers who prepared and served a hearty meal of homemade sloppy joes, tater tots, baked beans, orange slices, pickles, and cookies and ice cream to shelter guests on February 22. Special thanks to Laurie Greenberg and Darlene Downs for coordinating the event and grocery shopping!

If you want to join in on the fun, the next Simpson Shelter event is June 21, 2017 from 5-8 pm. Everyone is welcome!

THANK YOU!

Business Partners

Bret Roberts	Emergent Networks (our Platinum sponsor!)

ALAMN Members/Guests

Darlene Downs	Henson & Efron
Laurie Greenberg	Briggs and Morgan
Dani Przetycki	Modus Engagement
Norma Thayer	Zimmerman Reed
Cheryl Nelson	Robins Kaplan
Bob Karau	Robins Kaplan
Jennifer Doyle	Robins Kaplan
Cara Lindgren	Robins Kaplan
Rebecca Houle	Robins Kaplan
Kim Workman	Robins Kaplan
Pat Strom	Robins Kaplan

ALAMN COMMUNITY SERVICE

COMMUNITY SERVICE MEETING MINUTES

March 15, 2017 11:30-1:00

Zimmerman Reed
1100 IDS Center, 80 South 8th Street

Attendees: Wendy Cornelius, Darlene Downs, Pam Gerads, Laurie Greenberg, Sheila Johnson, Cheryl Nelson, Tracy Smith, Norma Thayer

Group discussion included:

- Recap of recent events, including the January Build a Sandwich, February Simpson Meal, and the March Big Brother Big Sister Collection
- Upcoming events, including April March of Dimes Walkathon, May Cookie Cart event, June Simpson BBQ, October Ronald McDonald House meal
- Following up on Disabled American Veterans opportunity, as well as Dress for Success Suiting and Interviews
- Starting to look at 2018 events such as House of Charity Lunch and a Pet Walkathon
- Next meeting is May 17, 2017 from 11:30-1:00 at Zimmerman Reed, 1100 IDS Center

ALAMN COMMUNITY SERVICE

5 WAYS YOUR CONFERENCE ROOM CAN REFLECT YOUR BRAND

By All-State Legal

ALL-STATE LEGAL

Any firm with more than two people needs a place to gather around a table to discuss ideas, meet with business partners and present to clients. Conference rooms are set up to serve as a meeting place. Often they are overlooked for their potential to reflect and reinforce a firm's brand.

Why It's Important Your Conference Room Reflects Your Brand

Conference rooms serve as a window into your firm. Not everyone will see your entire office. Often times guests are moved from the lobby straight into the conference room. You can easily convey your firm's culture and reinforce your brand through things like colors, furniture, art and other small details.

Picture this: you are presenting to a prospective client. The room is sterile with uncomfortable chairs, void of artwork, plants or decoration. Basically, its lacking any representation of your firm's brand and personality. There are no pens or pads available. Your meeting starts late because your technology is outdated or isn't working properly. How engaged will that client be with a mediocre or, even worse, a negative first impression? How much harder will you have to work to impress that client?

Make positive first impressions.

Even though we are told not to judge a book by its cover, we all still do - at least when it comes to first impressions. Several studies have shown that within seconds of meeting we decide a person's wealth, trustworthiness, success and other characteristics based solely on appearance. A meeting room that is lacking personality can negatively affect first impressions both of your firm and your presentations and meetings.

Establish a conducive work environment.

A more sophisticated meeting room helps to eliminate non-work related distractions and boost productivity. It can also encourage your team to be more professional and foster teamwork and innovation.

5 Ways to Brand Your Conference Room

Creatively extending your brand within your conference room doesn't have to be difficult or expensive. There are simple touches you can include in your conference rooms that will help extend your brand - from the moment a client enters your office, throughout your meeting and as they leave.

Your conference room shouldn't be an afterthought. A large portion of time spent in the office takes place in the conference room, so it is important that it reflects the type of firm that you are and displays a sense of professionalism.

1. Furniture, Decor and Technology

The first thing your guests see when they enter your conference room is the furniture, the color of the walls, the decor and the technology that you have available.

Your wall colors should complement the colors within your firm's logo. The furniture should complement your firm's image. Your decor - artwork, plants, etc. - should bring your firm's personality to life. Together, these elements will set the mood and reinforce your brand. If you want to project a progressive, creative image to clients - one that says your team is innovative and excited by the prospect of working challenging cases - furnish with a clean glass table, colorful, modern chairs and unique art on the wall. Decorating with large, burgundy leather chairs, a giant mahogany table and antique paintings will send a message of experience, sophistication and tradition.

When equipping your meeting room with necessary technology like monitors, projectors and collaboration tools, ensure you have hidden wires, store remotes and other devices in drawers or cabinets. Ensure all of your technology is in working order to avoid delays in your meeting. Try to keep your technology in the background as an aid for meetings, but not the focus. Having extra charging cables available will prove your firm's commitment to client satisfaction.

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5 WAYS YOUR CONFERENCE ROOM CAN REFLECT YOUR BRAND - CONTINUED

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2. Wi-Fi Network Name and Password

Always post the guest Wi-Fi network name and password in your meeting room. No one wants to start a meeting, running around trying to find the password or spend time spelling it out to guests. This wastes time, looks unprofessional and makes you seem ill-prepared.

Be sure the Wi-Fi information is visible and permanent, but also make sure you can easily update it when the network name and passwords are changed. A few options to consider...

- Use a tent card, printed on both sides. Display in the middle of the conference room or put one at each end - depending on the size of your table. You can also display on other furniture - such as bookcases or credenzas - that are in the room.
- Display using a frame or two-sided standing frame. Again the number of displays will depend on the size of your room and the furniture within.
- Have professionally printed business cards available. Display in business card holders that match the decor of the room. This allows for each guest to get set up at the same time so you can start your meeting more quickly. Plus they are the most impressive, personal presentation.

Additionally, be sure your router is located either in the room or just outside of it. Mounting routers on the ceiling, upside down, will keep them less visible yet still provide great range.

3. Materials for Note Taking

While we do live in a technology-driven world, many of us still hand write notes in meetings. Having materials available, both for your guests and your team members, shows your firm's preparedness and attention to client comfort and needs. When a guest asks if you have a pen available and everyone in the meeting starts looking, it is distracting. Don't derail your meeting before it even begins. And on those occasions where you or a team member fails to have a pen - or your pen runs out of ink - you don't need to interrupt the meeting in search of a new one.

Keep the below materials on hand and be sure they serve to further your brand.

- Pens - branded for the biggest impact
- Memo pads - branded for the biggest impact
- Legal pads - branded for the biggest impact
- Pen holders that match your decor

Finally, if you have a white board or glass board - be sure to have dry erase markers and erasers available. Making sure these items are stocked and in good condition prior to a meeting will help your avoid unnecessary disruptions.

4. Refreshments and Luncheon Supplies

If you've ever attended a meeting, you know that as soon as the meeting starts someone will need a drink. Or someone will start coughing and need a mint. Or someone's stomach will growl. And if you've ever attended a working lunch, you know that conference rooms can often double as a cafeteria. Take advantage of these situations by providing refreshments. This shows your attention to detail and your concern for your guests. Plus, many refreshment and luncheon supplies can add your brand to your conference room in subtle ways.

Whether you are serving a full lunch or just having a meeting, some essentials for conference rooms are:

- Placemats - branded for the biggest impact
- Coasters - branded for the biggest impact
- Napkins - branded for the biggest impact
- Mugs and glasses - branded for the biggest impact
- Insulated cups with lids - branded for the biggest impact
- Carafes and other containers
- Snacks, mints, etc.
- Coffee, tea, water and soda
- Creamers, sweeteners and stirrers

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5 WAYS YOUR CONFERENCE ROOM CAN REFLECT YOUR BRAND - CONTINUED

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Another absolutely essential, yet often overlooked item, is a trash can. A trash can ensures your conference room will remain tidy and professional for the next meeting.

5. Bottled Water To Go

Whether personalized with your brand as a great finishing touch or simply available to your guests, bottled water is a terrific addition to your conference room. Having water available in your conference room allows meeting attendees to remain focused on the content of the meeting. What better way to end a meeting and say that your firm cares than by asking if your guests would like water for their trip back to their office or home?

When Your Conference Room Reflects Your Brand

Now picture this: you are presenting to a prospective client in a room with professional furniture, comfortable chairs and appropriate wall decor. You have firm branded pens and pads available, easily accessible Wi-Fi passwords and small branded touches that make your prospective client feel like they are your top priority. How much easier will it be to engage and impress that client with your work product now that he/she has a positive first impression?

Make sure your client leaves focused on the details of the meeting instead of lamenting the minor inconveniences and missed details of your conference room.

About ALL-STATE LEGAL:

Founded in 1946 and headquartered in Cranford, New Jersey, ALL-STATE LEGAL is the legal industry's most trusted rebranding specialty printer. Our company has been involved in over 20 major rebrands over the past year, has a national footprint (with manufacturing and distribution centers located in and around all the major U.S. legal markets), a best-in-class online ordering platform and an experienced and knowledgeable client service team – all focused on providing the highest quality products and services to law firms of all sizes, from solo practitioners to the largest global firms. Over 94% of clients surveyed say they would recommend us to a colleague or friend.

KEEPING PARTNERS INFORMED WITH KEY PERFORMANCE INDICATORS (KPI)

By Jay Erdman, CPA, Principal of Rippe & Kingston

No matter a Firm's size, it must be able to identify and achieve its organizational goals to succeed in today's competitive Legal Marketplace. Key Performance Indicators (KPI) play an integral role in that success. Size doesn't matter... Start thinking BIG!!

Knowing how and when to measure and benchmark a Firm's KPI's against industry trends and best practices will help modify and improve the Firm's performance. However, it's not enough to simply track KPI. It is also vital to report your findings in a format that management can understand.

For the purpose of this article, KPI are simplified into Basic, Intermediate, and Advanced statistics. Keep in mind that KPI's are not always one line percentage stats and can also include supplemental reports that require further analysis. KPI's typically come in two flavors: statistics that are expressed as numbers or a percentage that can be compared against a like statistic; reporting that requires the user to analyze the elements of the report to reach a conclusion.

There is a third flavor that is just as important: Individual Statistics. Firm statistics don't improve unless individual statistics improve. Therefore, everyone (grinders, minders, finders) has KPI's to follow.

So, where should your Firm start?

There is a multitude of KPI statistics & reports available, way too many to effectively manage all of them at once (at least in the beginning). Choose the ones that are most relevant to the Firm and its culture, and grow over time. Remember that it is best for the Firm to measure against the Firm's past performance for improvement measurement, use that to develop strategy (goals) and measure against the strategy (goals), and then provide (some) objective measurement against other entities in the same industry. While it can be effective to supplement the Firm's strategy with industry knowledge, make sure the Firm is competing with itself, rather than attempting to keep up with the Jones.'

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FRAMEWORK OF KPI:

Basic	Intermediate	Advanced
	Practice Development a. Opened Files by Area of Law - Matter - Client	**Practice Development** a. Client Revenue by Year b. Matter Revenue by Year c. Cross-selling Report d. Client/Matter Minding
	Resource Management a. Monthly Calendar b. My Time	**Resource Management** a. My Team (budgets comparison) b. Cross-working Report
Asset Management a. Unbilled Time / Aging b. Unbilled Cost / Aging c. A/R with Aging	**Asset Management** a. Credit Limit Reporting b. Asset – Turn and Days c. New Clients/Matters	**Asset Management** a. Operational Statistics Analysis • With FTE Equivalents
Production Statistics a. Key Statistics	**Production Statistics** a. Utilization / Capacity Analysis b. Rate Assessment c. Write Off Analysis / Gaps	**Production Statistics** a. Operational Statistics Analysis • With FTE Equivalents b. Write Off Analysis / Write Up/Down Reasons
Financial Statements a. This year vs. last FS	**Financial Statements** a. Budgets b. Profit Plan	**Financial Statements** a. Operational Statistics Analysis • With FTE Equivalents
		Profitability Analysis a. Profitability

KEEPING PARTNERS INFORMED WITH KEY PERFORMANCE INDICATORS - CONTINUED

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BASIC

Asset Management

Beginning with the basics of Asset Management, start by tracking Unbilled Time, Unbilled Cost, and Accounts Receivable with Aging (aging periods set up relevant to the Firm). Knowing the dollar value of these statistics, as well as the variance by percent when comparing years, is essential to understanding the rudimentary Financials of your Firm.

Production Statistics

Production Statistics at the Basic level involves having Month to Date and Year to Date data, such as Billable Time hours, Total Time Dollars Billed, Total Cost Dollars Billed, Write ups/Write downs, etc., at your fingertips. Beginning to follow the trends of that data is important and is a good starting point to evaluate your Firm's progress over time.

Financial Statements

Basic Financial Statements, such as the Comparative Income Statement, is also an effective method to assess any improvement (or lack thereof). Again, the Firm should compete with itself and strive to be better than last year.

INTERMEDIATE

Practice Development

Easing into the Intermediate level of KPI, the notion of Practice Development comes into play. By tracking opened files by Client, you can ensure that Clients are initiating new Matters (in growing your Practice).

Resource Management

Time has to be worked in order to be billed and collected. Resource Management at an intermediate level is about understanding the Attorneys' time. Timekeepers should know their expectations and be reminded of them often. Each Attorney should be held accountable and have daily, monthly, and annual billable goals. When individual statistics improve, Firm statistics improve.

Asset Management

Overseeing credit limits is an important part of Intermediate Asset Management. Start by requiring Originating Attorneys to think about a new Client's ability to pay by implementing credit limits as a "Best Practice" initiative. Closely monitor Clients at or above (e.g., 80%) of their limit.

Understanding your inventory calculations is extremely important.

- Inventory turn is Annual Billable Time ($) divided by Unbilled Time Inventory ($).
- Average Days in Inventory is Unbilled Time ($) divided by Average Daily Billable Time ($).
- Accounts Receivable Turn is Annual Fees billed ($) by Average Accounts Receivable ($).
- Average Days in Accounts Receivable is Accounts Receivable ($) divided by Average Day Fees ($) Billed.

Note: Average Daily Billable Time $ is Annual Billable Dollars divided by Working Days of Year (i.e., 252). Average Day Fees Billed is Fees Billed divided by Working Days of Year.

Production Statistics

Intermediate Production Statistics involves Utilization / Capacity Analysis, which addresses Attorney performance. Capacity Analysis (by Working Attorney or Practice Group) is calculated by YTD Billable Hours divided by Budget Hours.

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And the next ALA**MN** Shining Star is…**Patti Ploehn**

The Board is pleased to announce the selection of Patti Ploehn as a Shining Star of our chapter! Patti is the Administrator at Henningson & Snoxell, Ltd and has been a member of ALA and ALA**MN** since 2006. Patti has played an active role in our chapter's leadership. She recently received her Certified Legal Administrator (CLM) designation and will also be co-chairing the Business Partner and Conference Committee in 2017. Patti's past contributions include co-chairing the Small and Medium Firm Committee. Thank you, Patti, for your leadership, contributions, and commitment to the ongoing success of our chapter!

KEEPING PARTNERS INFORMED WITH KEY PERFORMANCE INDICATORS - CONTINUED

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Rate Assessment, or Rate Audit, is also an important facet to Production Statistics. Knowing how many days elapsed between time entry date and rate start date can alert the Firm to refresh rates accordingly.

Understanding Write-off Analysis can be helpful in understanding the Firm's Production Statistics as well. Asking the right questions might be helpful. For instance, were the Write offs due to Client rates less than Firm Standard rates? Were Write offs in the billing process for time or cost? Were they due to A/R adjustments?

Financial Statements

Budgeting is an essential part of the financial planning process. Therefore, Financial Statements comparing actual to budget (forecasts) should be part of monthly reporting.

ADVANCED

Practice Development

In the Advanced level, Practice Development should be analyzed further. Understanding this year's revenue identified by the year the Clients were landed (i.e., Client/Matter Open Date) can provide a clear measurement of how well you are refilling your Client 'rain' bucket.

A Cross-selling report identifies a Client's interaction (or lack thereof) with the available services (Practice Groups) that a Firm could offer. A Client typically becomes a Client because they are seeking a solution to a problem. Over time, a Client should be sold other services by other Practice Groups within the Firm.

Client/Matter minding is extremely important, as Client relationships are the foundation of the Firm. If there are Clients that have not been contacted in the last 180 days (evidenced by the lack of time entry), Attorneys should be aware and taking action.

Resource Management

Advanced Resource Management is about effectively matching billable resources to billable projects, as well as comparing (and analyzing) the team's billable hours against its budgeted billable hours.

Similar to Cross-selling reports, a Cross-working reports (Billable Time and Write Up/Downs) can shed light on how groups interact in solving Clients' problems.

Asset Management

At an Advanced level of Asset Management and Production Statistics, Operational Statistics Analysis with FTE Equivalents can become important. They can provide comparability between periods as census statistics grow or shrink.

Production Statistics also involves Write Off Analysis and Write Up/Down Reasons. Reason codes are helpful, so that data can be identified and analyzed more easily. Understanding where all write-offs occur (discounted rates, written off time entries, written off cost entries, invoice discounts, AR adjustments, etc.) can help close those gaps and increase Partner profits.

Financial Statements

Financial Statements at an advanced level can provide key operating statistics presented per FTE Equivalents. This will assist in tracking the Firm's expenses at evolving levels of billable resources (size).

Profitability

Profitability Analysis is an Accounting allocation process, which measures the gross and net contribution to the Firm's profits of a given revenue stream. It involves identifying revenue streams, identifying direct costs, identifying indirect/overhead costs, and applying direct and indirect cost to revenue. Understanding the gross and net contribution to Partner profits by product line (Area of Law), Originating Attorney (who sells the product), Client (who buys the product), Billing Attorney (who manages the product delivery), and Working Attorney (who does the work) is an important management tool.

Determine at which level the Firm should begin (or is) in its evaluation of KPI – Basic, Intermediate, or Advanced. Choose the KPI that are most pertinent to your Firm and develop as time progresses.

Again, think BIG!

About The Author:
Jay Erdman, CPA, a Principal in Rippe & Kingston, LLC, consults with a large number of Law Firms across the country on a range of topics including Partner development and Financial Management issues. He has spoken at local, regional, and national ALA and ABA events. Jay earned his degree in Accounting and Management from the University of Cincinnati and now has over thirty-five years of accounting experience and Law Firm specialization.

THE WORST MEETING YOU CAN HAVE

Alison Lukan, Strategic Management Consultant

Who doesn't roll their eyes at the thought of "another meeting?" But, while many of us think that it's the volume of meetings that impacts our ability to get things done, there's actually something far more dangerous to your productivity, and that's the worst meeting you can have: "The meeting after the meeting."

We've all been there. We're engaged in a conversation, meeting or presentation where something is said or done that rubs us the wrong way. It feels personal, or at the very least it feels "wrong."

So what do we do after that meeting adjourns?

We get on the phone, walk into our neighbor's office or cube, or get on our IM to complain about what just happened. When we're done, we feel so much better. After all, we've usually found a comforting ear or an outlet for our frustrations.

But here's what's wrong.

What we've done to fix the problem – that thing that bothered us so - amounts to absolutely zero.

And we've not only wasted our time rehashing the infraction, we've wasted another person's time as well. And that means less time to spend delivering service to our clients; and potentially coloring another's perception of the issue at hand.

Meanwhile, the person who has wronged us with their work product, proposal or words is blissfully unaware that they've caused damage. And that means they are likely to repeat the same behavior again – repeating the cycle of wasted time and energy.

So how do we eliminate the worst meeting?

It's not easy – but you can do it. And it involves setting some ground rules in your culture and management approach.

The first thing we recommend is implementing a firm-wide understanding of how to deal with someone who brings a problem to you, that is not a problem you created. This happens a lot when we are managers, or main points of contact for others in the firm.

When someone vents to you there are only three possible responses:

1. What did that person who you are upset with say to you when you talked to them about it?
2. If you haven't talked to them about it, when are you going to do that and do you need my help?
3. If you aren't willing to talk about it, are you ready to live with it and not be negative about it?

This approach challenges people in your firm to deal with those who can help solve the issues that exist, versus spinning their wheels in frustrating "just hoping" bad behavior will stop. It also reclaims the time of your team members to address the responsibilities of their job without spending hours "caught up in drama" or working late to make up time that was lost in the "meetings after meetings."

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THE WORST MEETING YOU CAN HAVE - CONTINUED

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While this approach may seem easy, it's not. It's the hard work of communicating difficult things. And that means that you need to invest the time in learning how different members of your team – those who work for you, with you, and for whom you work – communicate and then putting in the work to learn skills to effectively get a message across to another.

I'm sure some of you are saying "this is fluff" or "we have real work to do." And I get it.

But the business benefits of successful communication are well-founded.

Author Patrick Lencioni has written *multiple books* on the challenges of leadership, communication and working within teams as well as the impact of doing one, or all, poorly.

In perhaps his most popular book, *"The Five Dysfunctions of a Team"* Lencioni outlines five main obstacles that prevent a team from accomplishing their goals, and, not surprisingly points to a foundation built – or broken – in communication.

Without open and honest discussion - that is founded in an ability to share all of one's concerns and opinions with colleagues - Lencioni opines that it becomes almost impossible to have a truly proofed plan or shared goal. And without that, team members never fully commit to the plan, let alone achieving the results.

So as petty as an inter-office spat can seem, or that 15 minutes complaining about a co-worker or decision, each of those "meetings after a meeting" slowly erodes the foundation of effectiveness within your firm or team.

Demand that you and your colleagues use your time more effectively, and get things done more efficiently by building strong communication among team members and cancelling all the worst meetings you can have!

About Affinity Consulting Group:
Affinity Consulting Group is the largest consulting firm in the country focusing on the management and technology needs of law firms of all sizes. Affinity helps law firms and legal departments run the business side of their operations by looking at people, process and technology. Trusted Advisors, Tailored Solutions, Unlocking Your Potential. Proud VIP Partners of the ALA.

DO AS I SAY...

*By Abby Rooney, ALA**MN** President-Elect*

As legal managers, we are tasked with holding firm members accountable to a multitude of firm rules. Thou shalt get your time entered. Thou shalt ask for time off in advance. Thou shalt schedule conference rooms using the intranet calendar. Thou shalt complete your performance reviews in a timely fashion.

But are we above these rules? Do our actions show that we are leaders in upholding the rules? Or do we sometimes, maybe, kinda, see ourselves as the exception to the rules?

It is the classic case of the "shoemaker's children having no shoes." We might have a tendency to spend our efforts on holding others accountable, or to get out of their comfort zones, but not holding ourselves to those same standards. Instead of excusing yourself, I challenge you to hold yourself to an even higher standard and actually model the behavior that you hope to encourage. Here are a few examples of what I mean, including some (hopefully) compelling reasons why.

1. **FEEDBACK/REVIEWS.** Spend the time to complete thorough reviews of your staff. Don't just rush through and check it off of your list of to-dos. You'll gain an appreciation of what the other managers and attorneys go through. Those who are doing what we ask – spending quality time on each individual review, hopefully motivating the person being reviewed to keep up the great work and/or improve their performance – know that this takes longer than 15 minutes. However, the time that is put in by the reviewer often has a correlating output; many of those we evaluate crave feedback and will often work harder and smarter when you help to direct their efforts.
2. **TAKE TIME OFF.** Do you encourage your staff to use their PTO? Do you cite the benefits of truly checking out and rejuvenating one's body, mind, and spirit? Then why the heck don't you use your own PTO? True, many of us have so many days accrued that we'd be out of the office most of a leap year if we chose to use it, but even a few weeks a year away from the office should be planned, used, and appreciated. Think of it as giving your staff time away from you, too. Guess what? The firm won't close/burn down/suffer an alien attack/become buried under volcanic ash if you zip down to Nashville for a long weekend. Don't be shy about using your time off.
3. **OPEN DOOR ATTITUDE.** Chances are your firm has an open door policy. (Dust off that handbook if necessary.) What that usually means is that any person, at any level of the organization, can approach any one else, at any level of the organization, with a question or concern regarding policy. Ok, great. We have that policy, and we communicate it during new hire orientation. Check. But when someone actually appears in the threshold of your office, what do they see? Is it an inviting space, a smiley, heartfelt welcome, and an invitation to sit and stay as long as that person may need until they have aired their concerns? Or is it a frazzled "Huh?" followed by the hasty removal of files and paperwork from the guest chair, and the distracted eye contact of someone who can't possibly miss an email the second it pops into their inbox? Analyze what message your office and your body language are sending to others, and make adjustments as necessary.
4. **PERSONAL PROFESSIONAL DEVELOPMENT.** Whether you've been in your role for a three years or three decades, you can still learn something new about your field, the business of the legal industry, or new technologies. We help firm members identify CLEs and CEUs, we administer our firm's LMS systems and Training and Development programs. Don't forget to take advantage of continuing education for yourself. Tap ALA and ALA**MN** for multiple opportunities to learn online, via webinars, in person education sessions, and from your peers.
5. **DIVERSITY AND INCLUSION.** This is such a great area to practice what you preach, or put into play something you've seen in a seminar. Many firms have embraced the "diversity" portion of Diversity and Inclusion. It is "inclusion" that often still has a hill to climb. To embrace that piece, identify, then make moves to overcome your unconscious biases. It is easy to say, "I just don't have time," or "my lunch hour is for me to spend time with friends." But what if you are missing out on your next great connection because you haven't initiated a meaningful conversation with that new associate? Start by going to lunch with folks from your firm with whom you don't have obvious commonalities, or get coffee with someone in the office whom you haven't had a chance to get to know very well yet. Given a chance to speak beyond small talk, you'll likely find a connection and forge the beginnings of a bond.

The bottom line – don't be above the rules. Exemplify them. Embody the culture you are helping to foster. Do as you say, and practice what you preach.

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