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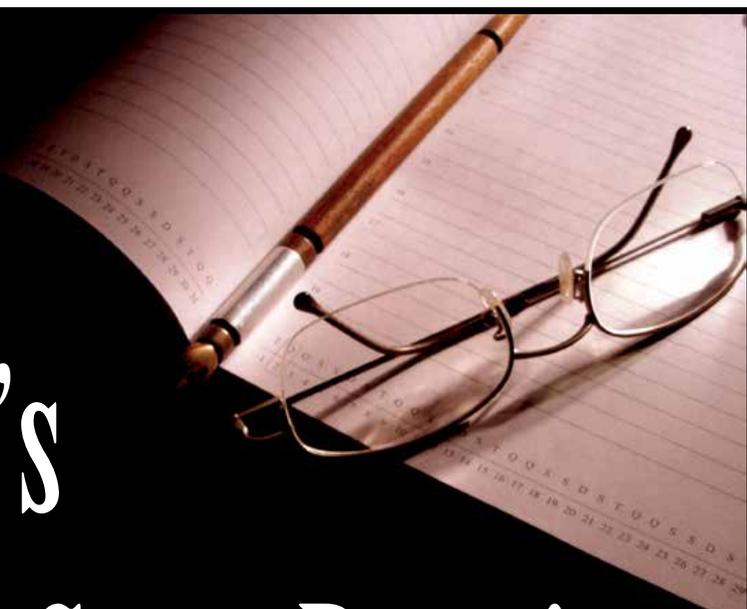
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As depicted in the beautiful cover shot taken by NJALA member Audrey Serban, Washington, D.C., was the setting for the recent 2013 ALA Conference & Exposition. This annual special edition features articles written by our lucky scholarship winners as well as a photo montage from the conference.

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## NETWORKING WITH NJALA— A TRUE WIN-WIN

BY MARY ELLEN DOLAN

We just finished another incredible national conference as ALA welcomed members and business partners from across the globe to Washington, D.C. for its Annual Conference and Exposition. Unfortunately, because of unexpected health issues, I was forced to cancel my attendance at this year's conference. I was very saddened that I could not attend, because it was the first conference I had to miss in nine years. When I attend these conferences, I always take full advantage of all of the wonderful opportunities offered by ALA, and I strive to make my experience as rewarding as I can. I have always realized the tremendous professional value in attending, and one of the key areas I focus on while at the conference is networking. I am sorry to have missed out on those opportunities this year.

When I sat down to write this article I thought about this past year and the wonderful opportunities I have had networking with our members, business partners and members of the New Jersey State Bar Association. As NJALA President, I also realized that networking was the key to the continued success of the New Jersey Association of Legal Administrators. There are so many networking opportunities available to our members and I strive to make at least one new connection at each event. This makes my efforts a "win-win" for me both personally and professionally.

Had I attended the conference, I most likely would have written an article summarizing a session I attended. Instead, I thought I would focus on the art of networking to remind our members that this, too, should be a top priority for all of you.

The dictionary definition of networking is: *to cultivate people who can be helpful to one professionally, especially in finding employment or moving to a higher position.* While that last part may be an added benefit, for this message, I will remind people

of the Top Ten Tips of Marketing Professionals. While I cannot claim authorship to this list, I certainly felt this was a message to be shared with all members as a reminder that we are only as strong professionally as the network we develop. Christy Burke of Burke and Company compiled this list and below, I have prepared a summary of her Top Ten Tips.

1. **Lunch Up:** Get out from behind your desk. Man (and woman) cannot live on phone and e-mail alone!
2. **Have Business Cards Handy:** Don't leave home without...your business cards! Bring business cards everywhere you go. You never know when you might meet a great contact. They may seem old-fashioned, but they're making a comeback.
3. **Keep Contacts Fresh:** Touch base with key contacts every few months. By staying at the top of their minds, you stand a good chance that they'll call upon you when they need someone with your expertise.
4. **Choose Events Wisely:** No one in today's world has unlimited time, so carefully select the events that you attend. Better yet, stick with ALA and NJALA events or come back if it has been a while.
5. **Make a Friend First:** Most people don't like the hard sell. Instead, they prefer to work with people they like and trust. If you don't know anyone at a particular networking event, seek out a person who is standing or sitting alone. Nine times out of ten, he or she will be grateful that you came over. They will remember the gesture—and they'll remember you!

**“The dictionary definition of networking is: to cultivate people who can be helpful to one professionally, especially in finding employment or moving to a higher position.”**

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## Networking with NJALA

(Continued from page 4)

6. **Be Memorable through Sincerity:** The best way to be memorable is to show a sincere interest in the people you're meeting. Listen to what they tell you, and ask them questions about themselves.
7. **Remember Names and Details about Others:** How many times have you met someone several times and you keep forgetting the person's name? This can be embarrassing and detrimental to the impression you want to make. Develop creative techniques to remember people's names and write details about them on their business cards.
8. **Leverage Social Networking:** Social networking sites can be a great source of business—they're not just for teenagers! Professional sites like LinkedIn and ZoomInfo are free and give you a completely different outlet through which to contact people and build your contact database. Personal sites like Facebook and MySpace may provide opportunities to rekindle communication with people you've met in various settings, including elementary and high school.
9. **Follow Up—Brush Up on Your Handwriting:** After an event, touch base with each person you met. If you promised to send them something like a person's name, an article or a book, keep your word and send it. E-mail communication is convenient, of course, but consider sending handwritten notes and following up by phone.
10. **Be Yourself:** To be a great networker, you don't have to be a brilliant conversationalist or fast-talking salesperson. You do have to be willing to stick your neck out and present yourself to the world. Whether you're attending events, writing articles, delivering educational training or blogging about your industry, you're making a contribution and demonstrating your value to the world. Establish momentum in ways that suit your personality. Once the ball gets rolling, you can keep it moving in the direction that you want to go—onward and upward!

While many of us are superb networking professionals, it is always good to read reminders about how to continue to flourish in this area. Your efforts will help you grow professionally and hopefully, you will use some of these techniques to help further develop and expand NJALA's network as well. That will make your efforts a true "Win-Win" for all.

*Mary Ellen Dolan is the Office Administrator of Greenberg Traurig, LLP in Florham Park*

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## MANAGING PARTNER EXPECTATIONS

BY CHRISTINE S. FILIP, ESQ.

Managing partner expectations is an oxymoron in any setting and it raises unsettling issues when the “managing” discussion is between a partner owner and a non-owner staff professional. How does management staff proceed in this uneasy environment to effectively manage, or more realistically, negotiate expected results with partners? More to the point as the Great Recession recedes, how can staff contribute to the future of the firm, particularly in the area of business development, when the calculus of power are uneven?

In the process of assembling materials for this article, I asked these questions of some of my colleagues in accounting firms since accounting firms are often central to the review and advisement of management operations in law firms, and truth be stated, they sipped the marketing tonic a bit earlier than law firms. Finally, the growth of many CPA firms stems from acquisitions and mergers, and, as a result, those that are successful have encountered the need to create a common culture and expectations to flourish, two learning points that that are pivotal to law firms.

Any working relationship in any industry between a professional employee and his/her manager is effective when two factors are present:

The expectations of both parties are the result of a negotiation about reasonable outcomes, based on objective data, *not* unilaterally imposed. For example, my colleague, Rhonda Maraziti, Director of Marketing and Practice Growth at WithumSmith+Brown relates: “Teaming with the marketing department, we develop a strategy to best leverage our dollars, with decisions based on past experiences as well as data analytics derived from our own revenue numbers or through the communication tools and/or media channels we use.”

Expected outcomes are open to further discussion if circumstances change.

### Culture Creates Behavioral Expectations

A threshold earmark of successful leadership is the open discussion and embrace of core values and goals that motivate behavior to produce results that benefit an organization. Commonly held expectations produce concerted actions. As a long time ex-IBMer, when I meet other exes, we often chuckle at the management phrases we have in common, such as “completed

staff work,” meaning take solutions, not problems, to your superiors; “You must earn the right to new business”; and “If your people don’t get promoted, neither will you.” These writings on the walls of our minds were clear expectations that mediated our behavior on the job and results for the firm. It was not Kool-aid, but vitamins.

Rhonda Maraziti describes the culture of her firm this way: “We have a strong marketing culture at WithumSmith+Brown, and our CEO is 100% in support of my department’s efforts. It is expected that our partner group work with members of my team to develop short- and long-term marketing strategies and growth goals for their offices and their niches.”

Susan Wernick, Director, Public Relations at Bederson & Company LLP, says, “We have a marketing mindset, which is key. Our firm was built on entrepreneurial spirit 75 years ago. Our leadership has vision and understands the necessity of educated risk taking.”

Applying the process of creating a common culture to managing partner expectations in law firms is tricky business because it means managing up, literally the influencing of owners by non-owners, and owners who are often more individualistic decision makers than they are team-minded players. Having said that, anyone who is not at the pinnacle of power in the workplace has to manage up; this is a pervasive negotiation paradigm across all industry sectors and summons a reprise of the elements of both principled negotiation and coaching, albeit on the fuzzy topic of enculturation, which is an articulation of common goals to get more concerted activity.

### Negotiating and Coaching Up

As a business professional, management staff in law firms are paid for the intellectual ownership of one’s area of expertise. Ownership means the giving of your best advice and the management of your area to produce results that you and partners expect. So as not to confuse efforts with results, anytime the issue of “expectations” is on the table, it requires a two-way negotiation, meaning a discussion of common goals within a range of best interests for both parties, in the presence of conflict, and leading to an expected result with which both parties can thrive. Significantly, a negotiation means that both parties adopt changed or new behaviors.

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## Managing Partner Expectations

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You cannot manage partner expectations without negotiating a result you both can embrace. For example, in the midst of the recession, many law firm managers were “expected” and directed to cut expenses. If your response was, “Fine, I’ll do that,” without the concomitant negotiation on how the firm is setting expectations for the other side of the coin, which is revenue generation, the scale of how much you are expected to cut and how often, is out of your hands. This is not your best advice, is it?

When managing partner expectations is a principled negotiation, everyone wins, but the framing of expectations as a negotiation, per se, takes the courage to offer your best advice and get the other side to contribute to a better result at the same time. As a professional, you need to do the work of pre-planning a negotiation. If the very concrete issue of expense cutting is on the table, what actions taken by the partner would effect better revenue generation? The list of potential beneficial actions is well documented and requires you to do “completed staff work,” literally preparing a list of options or decisions.

The coaching element of a negotiation relies on your ability to discuss why the partner should contribute to a better outcome. In the expense cutting scenario, usually with a managing partner, the coaching insight should be based on objective facts and standards such as:

Your voice is needed to get more attorneys to be active in business development activities because (objective facts):

Revenue is down 8% over last year and to make up that difference we need at least three (a number reliant on your analysis) more partners to be involved in business development activities such as speaking, writing and involved in organizations in which our best clients and client prospects are involved;

If you are to get that kind of cooperation, you need to articulate that our firm’s culture is one of acting like a team, pitching in;

I will translate your expectations to my team, and you need to openly endorse behaviors that remediate our financial position.

### Inspect What You Expect

The first axiom of good management is to inspect what you expect along the way so that there are no surprises. Here is how Rhonda Maraziti uses client relationship management software (CRM) to inspect progress every two weeks and then after client acquisition: “[W]e track our new opportunities utilizing our CRM tool, and have developed a pipeline report that we generate from the data in CRM. A bi-weekly report is shared and discussed amongst our partner group.

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## TRAINING PROGRAMS: ARE THEY WORTH IT?

BY DOREEN MARINO

*I would like to thank some of our fellow law firms who have contributed to the research of this article. I thank these people for their time and responses. It guided my research and provided very good insight as to what firms have already accomplished.*

Do any of these scenarios sound familiar?

- You receive a request from a partner that he needs someone to work on a project other than his assistant because it requires *advanced* technological skills. He suggests one of the younger, newer secretaries who are quicker and more accurate.
- You spend time trying to find someone that can handle revisions to a client's Excel spreadsheet and need someone who understands that the cells are packed with formulas.
- A partner is trying to present convincing evidence to a jury and needs someone to make his presentation to be animated and expressive with certain testimony.
- You have two employees who are forever fighting and bickering over the stupidest things. You know they need to learn how to get along and you are exhausted from telling them that.
- You have employees who just come in, do what they have to do the job, collect a check, and go home. You know they should be more productive.
- You have employees who are bored with their job. They give no consideration to when they take off, and typically do so when something important is due or needs to be done.

Does investment in training solve these problems? Actually, yes, it does.

We all know that firms have had to take steps in investing in attorney education in order to meet the requirements of the New Jersey Bar. Some firms have been accredited to do this in-house and some have allotted budgets for attorneys to go externally for credits. So this article is focusing on what firms

are doing for non-attorneys. However, I would like to point out that there are several areas that would benefit the attorneys as well.

Let's look at the benefits reaped by some of our firms. Then we can look at different ways firms went about the training.

### Benefits of Training

I think the reason behind the training is clear. You want your superstars to continue to be superstars, you want your average employee to be more productive and dedicated, and you want an avenue to make your bottom performers **want** to be better. You want people to understand how to improve interpersonal skills, how to be healthier, how to service different generations of clients, etc., and you want them to do this without being told to. Fantasy? Maybe not.

Investment in training for existing employees results in financial savings and offers fundamental values:

- Employee retention. Recruiting costs go down and time spent on recruiting and on-boarding is significantly reduced.
- Productivity increases because (1) employees are more skilled; and (2) employees become more engaged when a firm invests in their development.
- You are going to have time to do better things! Your time can be spent on more meaningful projects. Day-to-day management issues decrease and you are able to manage at a different level.
- Employees believe they are making a real difference in the firm and become part of the firm's success. Teamwork evolves as a result.

### Determine the Training Needed

There are different reasons for wanting a training program and those reasons need to be differentiated. There is training that is needed (to update and/or rejuvenate skills) and there is training that is to improve the development, well-being and education of the employees (such as mental health, financial health, wellness, behavioral education, etc.). Training that is needed should be addressed first.

If you are in the early stages of developing a training and development program or are contemplating starting one, it is

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## Training Programs

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clear that you cannot do all the training at once. So, try it one step at a time. Many times it is obvious what training is needed and sometimes it is not. If you are struggling with what training is needed most, you should conduct an assessment. Assessments assist in guiding employers on what training is needed and prioritizes the most needed training. Assessment Testing can be done electronically. There are hundreds of different tests in different areas. For example, if you are looking for technical assessments for the Microsoft Office, you can try <https://www.executivetrainingsolutions.com/assessments.asp>. There are similar programs for just about any office testing needs. Microsoft even has its own web-based training programs that you can take advantage of.

### Developing Training

*“Therefore, do not limit yourself to a single system or style of training. There isn’t a single right way, and never will be, regardless of what others may tell you. The only style of training that you should limit yourself to, is a style or mindset that has no limitations.” Ross Enamait*

You need to remember your audience. As you all know, people learn differently. So you need to be flexible in how your present training and education. Remember your generational differences. Older generations learn from a classroom environment while the younger generations learn from on-line programs. Offering a variety or mixture of both can prove to be beneficial.

First you need to identify your training needs and then focus on either what is a more prevalent need or what can the budget afford. If you are thinking you can’t afford any budget, keep reading. The good news is that most of the in-house training can be done by people around you or maybe even yourself.

For skill enhancement, you begin by generating a list of possible training that would be beneficial. Try to stick to training for the majority. The more people that benefit from the training, the better, and more favorable of a result you will get. A good resource for this is your job descriptions. For example, most secretarial job descriptions should contain some requirement language such as “proficient in Microsoft Word” or “must be a team player.” And then figure out what requirement is lacking the most. If you don’t have a job description, this would be a good time to start creating it.

Ideas brought to my attention by other firms are team building exercises, business writing, grammar update (yes, it has changed), law firm ethics, exceptional support, work/life balance, understanding your neighbor, how different personalities get along, and practice area training.

For social development, pick areas that everyone can obtain benefit from, like possibly “proper business attire” or “personality profiling.” You can even use this area to focus health and wellness education, education about a benefit that

people do not understand, etc.

If you are stumped and do not think any training is required, ask your partners what they think can be enhanced.

### Implementing Training

Once you decide on what to train on, then you need to take a look at how to go about doing the training. Here are some options that firms have used:

- Tap into internal resources. This works for mid to large size firms that have the staff that can do this on a regular basis. The benefits person can do the benefits training, the IT software person can do the software training, etc. What? Did you say that the person you are thinking of is no trainer? There are plenty of “train the trainer” one-day sessions or on-line sessions that are well worth the return of investment. <http://trainingtoday.blr.com/employee-training-topics/Online-Employee-Training>.
- Survey your staff. Staff members who are proficient in certain functions may love the opportunity to develop a syllabus, training outline, and conduct the training classes. This gives more opportunity to the employees, changes up their responsibilities. My staff mentors hold monthly focus group meetings where they train their colleagues on topics or problems that have arisen in our practice area.
- Survey your attorneys. Many attorneys enjoy teaching. If you are trying to fine-tune your staff’s abilities or simply want to educate them on the firm’s business, assess your attorneys and see if they afford the time to do it. Keep in mind, this is also a great development tool for younger attorneys to take on. They learn it themselves and they work on presentation skills.
- Tap into your vendors/carriers: You would be surprised how many people you do business with provide training. It is no different than having your medical insurance carrier come in to talk about the medical during open enrollment. If you are lucky enough to have a broker, utilize them as a resource for training options on all benefits. Employees having trouble understanding the sizes of scanned documents? Look to your photocopy vendor for advanced training sessions. Do not forget your EAP (Employee Assistance Program) provider. They can provide excellent training.
- Buy the training programs. A great investment. These can be utilized over and over again and it a great resource to help get new employees get up to speed. There are literally hundreds of programs that you can purchase. From technical training to office procedures (Microsoft can be found not only at their site but several others, e.g, <http://www.freeofficetutorials.com>; <http://www.cbtplanet.com/desktop-training/microsoft/office/>). All training facilities offer purchasable training programs such as Skillpath, Padgett Thompson National Seminars, Kantola Productions and Fred Pryor.

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## Training Programs

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- Web based training. Some firms that are able to invest in this have found this to be very beneficial (<http://www.westelearning.com>). Again, hundreds of web based programs can be found for majority of issues we find in law firms.
- Developed your own Learning Management System. A Learning Management System (LMS) is a software application for the administration, documentation, tracking, reporting and delivery of e-learning education courses or training programs. An LMS gives you the ability to customize an e-learning system which records and documents all educational sessions viewed. New employees can be required to view designated sessions. Employees under disciplinary action can be required to view certain sessions. Positive enhancement can record sessions voluntarily done by employees for the betterment of their abilities. How cool is that?
- Live Professional Trainers. You can always hire someone to conduct training. Sometimes if it is a one-time training experience, it makes sense just to hire someone and have people attend. Good examples of this is a one-time change. You upgraded your software, everyone needs to know about the upgrade, so it is best to hire a trainer to bring your employees through that change. Also, training that requires an expert, such as education on harassment and diversity education, should be done accordingly.

Remember that training and development is also an avenue that can be used for employee required improvement. Once training is established, you can utilize the training system to correct some disciplinary issues, which, in this case, the training sessions would be made mandatory. Whether it be a technical issue, an interpersonal skill issue or client services issue, training can be mandatory for them and demonstrates, as well as documents, the firm's best efforts to help them cure the problem.

One key factor you need to remember is that when people understand how to do something and why they are doing it, you empower them to act. As the administrator, you need to decide whether you want to (or whether your management should) be spending time dealing with issues resulting from lack of training and development, or do you prefer to invest that time in training programs. If you don't have the financial resources to do that, then look inside instead. It is economical and provides the same benefits. Training plans grow with time. You slowly add more programs and maybe wean off others as time goes by.

*Doreen Marino is the Human Resource Director of Lerner David Littenberg Krumholz & Mentlik, LLP in Westfield, New Jersey*

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## BEST PRACTICES FOR SETTING UP CHECKS AND BALANCES FOR LAW FIRMS

BY KENNETH WINSLOW, CPA

In today's business environment, in order to limit exposure to fraud and defalcation risk from within the firm and third parties outside the firm, law firms must institute sufficient oversight along with checks and balances.

Below is a best practice check list to assist you in reviewing your firm's own checks and balances:

- Check signing
- Electronic payments
- Bank credit agreements
- Bank statements
- Accounts Payable and Vendor Transactions—Policies and Procedures
- Vendor Changes
- Credit Card Accounts
- Payroll—paychecks/direct deposits; periodic reports; payroll tax payments; payroll service—and employee leasing companies
- Attorney trust accounts

### Banking Related Matters

#### *Check Signing*

With regard to check signing controls—all disbursement requests, in the form of check or electronic remittance, must be accompanied by an original invoice or requisition together with support for the review and approval for the expenditure; no check is to be prepared in advance; no blank checks are to be signed without exception; the Firm must limit and/or restrict the use of manual handwritten checks. The signed checks must be mailed by someone other than the preparer. Specific signor responsibilities must be determined based on the type of expenditure and dollar amount of the check. Certain checks may require more than a single signature. Firms must limit and control the use of signature stamps.

#### *Electronic payments*

For electronic payment processing, a designated computer should be used to access accounts; a segregated account with limited funding should be considered to process the payments and activity must be monitored on a daily basis to ensure payments have been transmitted and accepted.

#### *Bank Credit Agreements*

For companies that borrow and repay under bank credit

line agreements—all borrowing and repayment requests must be made by designated signors and approvers; all transaction processing must include a disclosure of the current debt balance; and all transaction processing must be acknowledged by a bank officer via email or phone.

#### *Bank statements*

Oversight of bank activity must occur more often than at the end of the month upon receipt of the bank statement. Designated signors/approvers must be provided separate electronic access to the bank account to allow for independent review and oversight of bank activity throughout the month. Paper statements must be delivered to a responsible signor for review and subsequent delivery to staff responsible for reconciliation and maintenance of the accounting records.

### Accounts Payable and Vendors Transactions

#### *Policies and Procedures*

The Firm must develop written policies and control procedures and provide sufficient oversight and training in support of its policies. The vendor database should be reviewed on a periodic basis for duplicate vendors, addresses and inactive vendors. All duplicate vendors and addresses must be investigated, corrected and/or removed. Old vendors that have history to be maintained must be marked as inactive, such that no additional postings can be recorded in the vendor record. When approving invoices, designate different approvers depending on expenditure type, e.g., office supply, information technology. Periodically, request bids from other vendors to check the pricing and product quality and/or service.

#### *Vendor Changes*

Restrict access to add/change vendors in the system, request documentation and approval for the changes and additions, such as correspondence on letterhead, business card, email address, website and indicate any firm relation.

#### *Credit Card Accounts*

For credit card vendors, review the name, address and account numbers. Restrict credit card vendors to Firm credit card accounts *only*. Assign one person as approver for all credit card purchases. Require an invoice or purchase request form for all credit card charges.

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**Best Practices**

*(Continued from page 12)*

**Payroll Processing**

Firms must secure paper and electronic payroll records; and require written authorization for all changes from new hires, terminations, and changes such as salary, bonus and related employee information. Direct deposit authorizations must be in writing and include only employees/recipients with a company email. Terminated employees must be deactivated.

*Periodic Reports, Payroll Tax Payments and Employee Leasing Companies*

Periodically, registers must be matched against an employee payroll roster containing base/average pay information. Annual payroll census data should be matched against expected payroll for fluctuations that may warrant further investigation.

*Notification from Government Agencies*

With regard to payroll service bureau tax filing and payment responsibilities, Firms must be included on all notifications from government agencies. Any power of attorney authorizations must provide for copies to be sent directly to the Firm. All notices and assessments from government agencies must be forwarded to the payroll service bureau for follow up and response. A written acknowledgement of the response and a subsequent resolution must be obtained from the government agency.

**Attorney Trust Accounts**

*Despite knowledge of the law, required procedures and the possibility of severe penalties including disbarment, a significant number of attorneys commit ethics violations every year. The Supreme Court of New Jersey's Office of Attorney Ethics Requirements under RPC 1.15 and 1:21-6 outlines a series of mandatory practices to ensure the proper handling of Attorney Trust Accounts on the part of the fiduciary.*

*Reconciliations, Check Signing, Monitoring, Approvals & Misappropriation*

Firms must perform monthly reconciliations using the specified 3-Way Format which includes: (1) Book activity, (2) Reconciliation to Bank statement and (3) Listing of Balances by client.

*Other Requirements*

Under the State's Requirements, all remaining client trust balances must be refunded. Stale, dated checks must be researched and cleared and unclaimed funds must be transferred to the State after making a sufficient effort to identify and locate the client.

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## HOW TO EVALUATE PROFESSIONAL EMPLOYER ORGANIZATIONS (PEOs) / CO-EMPLOYMENT COMPANIES

BY MARK SHORE

The annual Health Insurance evaluation often begs the question, “How do I lower premiums while maintaining benefits?” What is left to do after changing carriers, introducing Health Savings Accounts, Health Reimbursement Arrangements, reducing benefits and raising employee contributions? What are my options?

PEOs, or Co-Employers as they are often called, allow employers to access a level of benefits and competitive pricing not otherwise available to them for a variety of reasons: too few employees, too many claims, “undesirable” industry, etc. A PEO is comprised of numerous groups typically ranging between 5–80 employees. The aggregation of employees provides access to benefit levels and pricing restricted to much larger organizations than most individual groups could obtain from a prospective carrier.

Different types of organizations may perform similar functions, but they are not the same. For example, a Human Resource Outsourcer (HRO) is a third-party provider of common HR services. Single Source Outsourcing companies, also known as an Administrative Service Organization (ASO), also enable businesses to outsource certain HR functions. Because HROs and ASO providers are agents of the Firm, they cannot offer Insurance coverage to the employees of the firm.

PEOs can assume multiple HR responsibilities for their co-employers, including but not limited to payroll, workers compensation, establishing employee onboarding procedures, creating employee handbooks, creating employee evaluation and review procedures, offering Employee Benefits, Employment Practices Liability Insurance (EPLI), 401(k) plans, as well as regulatory compliance with various State and Federal laws. Contrary to popular beliefs, PEOs do not replace the existing HR department, but rather work in conjunction with them. It enables small employers the ability to provide Fortune 500 caliber HR functions and benefits.

When evaluating a PEO/Co-employer, consider the following:

### Are they established in my industry and area?

PEOs usually develop, create and maintain vendor relationships regionally, and are often concentrated in a state or metropolitan area. If a PEO is rooted in a region outside your geographic location, their relationships with health insurance carriers may not be beneficial to your firm, and could be detrimental. For example, a PEO with a strong presence in Philadelphia and limited presence in New York City may not have access to the carriers currently

available in the NYC market. If the carrier is the same as your current insurer, networks may be different. Additionally, due to the salary differentials between areas, worker compensation rates, unemployment insurance, disability insurance, etc. may be affected, and your firm could inadvertently subsidize other co-employers.

### May I maintain some of my current relationships, benefits and/or procedures?

Flexibility to choose which services you do and do not utilize usually result in longer, mutually beneficial relationships. All PEOs require they provide a minimum set of core services, usually consisting of payroll, tax filing, and workers compensation insurance. Many PEOs encourage the group’s insurance broker to assist with the transition, as well as maintain their relationship with the employer to provide many of the services they previously did. Ask if you are permitted to continue any procedure(s) you prefer, or do you need to adopt the PEO’s protocols, *i.e.*, paper or electronic applications, review procedures, etc. Reputable PEOs allow you to maintain processes you want, while providing access to processes, functions and assistance you wish to utilize.

### Are they a closely held company, or part of a larger organization?

Many PEOs are spin offs or divisions of payroll companies and/or subsidiaries of larger organizations. Often, they use the PEO as a strategy to offer additional services to their existing clients. The PEO division reports to, and is held accountable by, the parent company. This hierarchical structure may not always benefit the co-employers when downward pressure, or inflexibility, is applied to the subsidiary or PEO.

Many PEOs, however, are closely held private companies, similar to a law firm, and usually understand their co-employers better than a larger organization. They do not engage in a co-employment relationship with every potential company. By underwriting each potential co-employer, the PEO is able to maintain sustainable rates for, including but not limited to medical, disability, unemployment, and workers compensation insurance, as well as administrative fees, for all of their co-employers.

### What are the fees and how are they calculated?

Administrative fees are usually charged either as a percentage of payroll, or as a flat fee per employee per month. If the fee is based on a percentage of payroll, the PEO, intentionally, receives a fee increase every time an employee earns a raise.

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## How to Evaluate PEOs

(Continued from page 14)

Each PEO's health insurance plan renews on a date specific to the PEO and not **your** entry date, *i.e.*, premiums increase at the same time each year regardless of your start date with the PEO. For example, if a PEO's health insurance plan renews on October 1 each year, your health insurance rates increase on October 1, even if you just entered into the plan on September 1. Some PEOs have one premium level for all co-employers, and others have different "buckets" based on their underwriting. You may be placed in a more or less expensive "bucket" than your peers, depending on your risk factors, as determined by the PEO.

Once you become a co-employer, employees are no longer paid under your Federal Employer Identification Number (FEIN). They are paid using the PEO's FEIN. This potentially creates an additional FICA tax liability to the co-employer. If the contract start date is not January 1 and employees earn more than the maximum FICA wage base, you may pay FICA for amounts exceeding the maximum FICA wage. A PEO seeking a long-term relationship should create an incentive or offer pricing concessions to recoup this money.

You may or may not be able to maintain your Unemployment and Workers Compensation rate, again, depending on the PEO and their requirements. If unable to keep you current rate(s), you will adopt the PEOs rate(s) for the coverage(s).

**Are their benefit programs at least as good, or better, than I can get on my own?**

PEOs typically contract with one or two health insurance carriers. Because the PEO acts as one purchaser, carriers usually

do not allow the PEO to implement multiple carriers with one co-employer for a specific line, *i.e.*, Health. However, most co-employers may offer multiple plans to their employees with the carrier they choose. Depending on the PEO, you may be able to purchase a health plan with Out of Network reimbursement at more generous Usual, Customary and Reasonable levels.

PEO Long Term Disability (LTD) and Life/ADD policies are usually not as strong (contractually) as most firms desire. The definition of disability is usually weak for attorneys, often only protecting their "Own Occupation" for 24 months. Other contractual provisions are less beneficial compared to commercial policies written specifically for Law Firms.

In summary, PEOs may provide better benefits, additional services, State and Federal regulatory compliance, and efficiencies at a significant cost savings. Because PEOs are co-employers with you, seek PEOs that engage groups similar to you. Good PEOs are selective with the groups they co-employ. Similar to a Firm interviewing a lateral Partner, and vice versa, PEOs and Firms should "interview" each other to ensure a long, mutually beneficial relationship. Be cautious of a PEO that is not selective, as the other co-employers may pay for their bad decisions.

*Mark Shore is the President of Atlas Consulting Services, LLC. Atlas Consulting Services, LLC is a full service insurance brokerage firm. We have special expertise in sophisticated and complex employee benefit programs. Atlas offers a variety of individual and group benefit coverage programs. For more information, contact Mark Shore at 732-770-2801.*



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## MAKING THE CASE: WHAT LAW FIRMS SHOULD KNOW ABOUT LOGISTICS

BY WILL ROBERTSON

*Surprising tips to streamline operations and grow your firm.*

It seems that the legal industry isn't going to get less competitive or less complex anytime soon. Since 2008, some 15,000 attorney and legal jobs have disappeared, according to a Northwestern University Law Study. More entry-level work and repetitive, low-value tasks are being outsourced to contract temporary lawyers and non-lawyer professionals in the U.S. and offshore. In addition, a large volume of legal research—once the job of new attorneys—now can be done much faster through digital information sources.

Overall, the economic downturn has had a major impact on law firms. Although the industry is still facing tough times ahead, there are ways to stay ahead of the competition and achieve growth. Managing partners can turn today's challenges into opportunities by addressing an unexpected and often overlooked area of their operations—logistics.

Whether firms realize it or not, logistics can have a significant impact on their cost management, growth and reputation goals. Below are some surprising areas where logistics can have a positive impact on law firms:

### Process Efficiencies

Creating more efficient practices and more productive employees allows partners to focus on the core of their business—exceeding the expectations of existing clients and bringing in new ones. When looking at practices and processes that are part of a firm's day-to-day operations, logistics plays a significant role.

With the amount of deliveries being processed daily at the average law firm, inefficient shipping practices can take up massive amounts of a firm staff's time. There are shipping technologies on the market today that allow attorneys and staff to automate processes, validate client and matter codes upstream in the shipping process, reduce costly errors and inefficiencies—ultimately freeing up time and money that can be used to better serve clients and grow business.

As for the potential impact, some law firms have experienced estimated savings of eight hours in package tracking time and 40 hours in cost allocation time per week—just from adopting electronic shipping and visibility tools. Firms should request an assessment of their current shipping and visibility technologies to identify areas for improvement and savings. Some carriers even offer onsite training for staff on new technologies that can improve their operational efficiency.

### Branding & Marketing

With much competition in the marketplace, it's only natural that marketing has become a top priority for many law firms. Although many firms may not realize it, their shipping carrier can play a role in their marketing strategy.

For example, there are options such as customizable branded envelopes and labels that help increase the visibility of a firm's brand and set its shipments apart from others. Something as simple as changing the envelopes that a firm's documents and materials are delivered in can go a long way in building brand equity and make a powerful impression on clients. Customizable reusable envelopes also give clients a convenient and green way to return documents back to the firm.

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### Risk Mitigation

The third area that logistics can impact is risk mitigation. Minimizing risk is an increasing concern of law firms. Some shippers offer insurance services that provide protection against consequential damages for time-sensitive documents shipped. Standard declared value does not cover items like contracts and agreements, so this option provides firms with extra protection and peace of mind when shipping client contracts and discovery documentation that is crucial to a case.

Shipment visibility technologies that were mentioned earlier also help mitigate risk by giving firms visibility into the status of critical shipments and letting them make changes to deliveries when needed to ensure that documents land in the right hands.

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## Logistics

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### Client Service

Last, but certainly not least, logistics can have a large impact on client service. In addition to ensuring that documents arrive fast and on time, more sophisticated logistics processes allow firms to be proactive in alerting clients about the status of shipments versus waiting to react to client questions. For example, shipping technologies with automated alerts let firms know when there will be a delivery exception due to weather or security, giving them the opportunity to tell their clients in advance and manage expectations.

Overall, evidence is everywhere that logistics plays a large role in a law firm's operations. Making a case for logistics improvements shouldn't prompt objections among partners or administrative staff, all of whom stand to benefit from even small changes. Finding new ways to stand out in today's marketplace can pay off in terms of client loyalty, reputation and the bottom line.

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*Will Robertson is the Professional Services Industry Marketing Manager for UPS, responsible for providing value to clients through customized solutions that save time and money, mitigate risk, and improve client care. Will has more than 20 years experience with UPS, and has held multiple roles within marketing and sales. He can be reached at 603-703-1516 or via e-mail at [wrobertson@ups.com](mailto:wrobertson@ups.com). For more information, visit [www.ups.com/lawfirm](http://www.ups.com/lawfirm).*



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## 2013 ALA CONFERENCE AND EXPOSITION: AN INTRODUCTION

BY ELLI ALBERT

Have you ever wondered what really goes on at an ALA national conference? What's the big deal? Why it is so important to go? What could you possibly learn that you don't already know?

Conference first-timers from the New Jersey chapter—in addition to nearly two dozen repeat attendees from NJ—found the answers to these questions as they attended this year's conference, "Effective Leadership Through Changing Times," held April 14-17, 2013, at the Gaylord National Resort and Conference Center in National Harbor, MD, just outside historic Washington, D.C. This year's conference was attended by well over 1200 legal administrators from around the globe.

Most of those who traveled from NJ had never heard of "National Harbor, MD." Perhaps a bit to our pleasant surprise, National Harbor turned out to be a planned resort community that features an incredible hotel/conference center, several other nearby, popular hotel chains, residential condominiums, and a small resort town, approximately five blocks squared, that contained a variety of easy-to-walk-to restaurants and shopping. This beautiful, pristine town is located on a lovely harbor that provided great opportunities for those who wanted to spend time outdoors during breaks and at night. Best of all, Washington, D.C. is just a 20-minute ride away, for those who, like yours truly, wanted to take photos of the spring cherry blossoms, or just wanted to see the home to the U.S. government and the famous Smithsonian museum.

And now, onto the conference! There are plenty of opportunities to socialize with new and old friends at the conference. Those events included the Newcomer's Reception, a carefully planned introduction for first-time attendees. The opening night social for all attendees featured a delicious buffet and background music provided by a "colonial-style" ensemble—and plenty of time to meet and greet friends and business partners. The closing finale this year was quite an event. All attendees were transported by bus to the American Museum of History (part of the Smithsonian), where we were treated to a sumptuous, gourmet feast. A dance band played well-known tunes, and attendees danced the night away. As part of the evening, attendees were allowed to roam the entire museum, which featured exhibits including famous gowns worn by First Ladies, an exhibit on the Civil War and slavery in the U.S., the ruby slippers from *The Wizard of Oz*, and more diverse memorabilia than I could possibly list here. Between the opening and closing night social events, business partners hosted numerous events, which included cruises, cocktail hours, and dinner/dancing events.

The real point of the conference, of course, is education. This year provided a number of notable speakers, including keynote speaker,

Peter Sheahan, CEO of ChangeLabs™, who presented "Flip—Turn Challenge into Opportunity and Change into Competitive Advantage"; and David W. Brezina Memorial General Session speaker, André Tapia, President of Diversity Best Practices, who spoke on "The Inclusion Paradox" (which this writer and other NJ chapter members opined was the best session of the week).

In addition to these special speakers, dozens of general education sessions were offered on all topics of legal management, from finance to IT to human resources, for beginners to experienced administrators. For those CLMs in attendance, all sessions could be taken for CLM credit (great for those who need to recertify!). Everyone agreed that this year's sessions were uniformly excellent, and offered a great deal of new information on all topics. The ALA goes out of its way to schedule interesting, notable and popular speakers for its educational lineup, and this year was no different. In fact, I expect you may be seeing some of those speakers at NJ chapter events in the next year or two!

This year's exhibit hall was packed with business partners—the lifeline of our industry—who advertised new products, services and product updates. Members enjoyed roaming the exhibit hall, chatting with vendors, viewing demonstrations, and hoping to win some of the terrific prizes being raffled. (I note that several NJ members won prizes this year, including Visa and Coach gift cards, an iPad mini, and good old cash!) And everyone brought home loads of tchotchkes to keep their office staff happy.

In summary, and to answer the questions in the first paragraph of this article, everyone from NJ who attended this agreed that the ALA conference this year was a value-packed event. Each administrator came home recharged and armed with new ideas that could be implemented immediately. Even the most experienced administrator—several in our group—were treated to new knowledge and products, and everyone benefited from four days of networking and sharing experiences with administrators from all over the world.

The pages that follow offer articles written by this year's lucky scholarship winners, each of whom was asked to summarize an educational session that they attended. Please peruse their articles as well as the following photo spread, which will give you a small taste of what **you** missed if you didn't attend! Hope to see you next year in Toronto!

*Elli Albert is the Administrator of Berman Sauter Record & Jacobs, P.C. in Cedar Knolls. This is her last edition as co-editor of the Jer-Z-Journal.*







## RETAINING THE BEST AND THE BRIGHTEST

BY ROBBIN DOLAN, CLM, SPHR

I had the pleasure of winning a scholarship to the ALA's national conference in Washington, DC. While I was focusing on fulfilling requirements for both the CLM and SPHR re-certifications, I was lucky enough to change my plans at the last minute and attend Maureen Kolb's session on "Retaining Your Best Employees." What a wake-up call it was for me!

Maureen is the founder of CR8IVE Energies, an executive coaching and team building consulting firm located in Wisconsin. She is a motivational speaker and a successful one at that, because she was able to motivate me to change my thinking about my best employees. Attending her session really impacted me in a positive way.

Here are a few of Maureen's points.

Is retention a problem at your firm? Did you know that 25% of high potential workers leave within the first year? That 39% of workers do not feel appreciated, and that 38% are actively seeking a new job at all times?

We all have heard about the costs of turnover. Well, those costs multiply as employees' expertise increases. For an entry level employee, those costs are 30 to 50% of their annual salary. For mid-level managers, it's 150% of the annual salary. And for top level employees, it's a whopping 400% of their annual salary. These costs include recruiting, interviewing, orientation, training, lost productivity, lost expertise and customer dissatisfaction. These are incredible costs of doing business, but ones that can be managed.

In addition to the tangible costs, intangibles such as reduced morale, increased job stress from remaining workers covering the workload, and decreased customer service also occur. One consideration that was new to me was that friends frequently follow other friends. So you can not only lose one great employee at once, but also two or more. That can be devastating, especially to a small firm or practice.

The turnover statistics are mind blowing. It's not something that the busy administrator ever thinks about, as we put out fires and spend the day problem-solving. Of course when the less-than-stellar employees leave, we feel relieved. But when those stars give you their notice, your heart sinks and you think back right away, was there something I did wrong, or something else I could have done to avoid this?

A highlight of the presentation was the discussion about Retention Myths. Although most stars might say financial gain is the reason for leaving, the truth is that most people *leave their boss*. This was a hard one for me. The presentation caused me to carefully consider the reasons given by the few stars that have left my firm. Although they gave a plausible reason (wanted to be closer to home, increased pay) I am not sure based on the presentation that these were the entire reasons.

Another highlight was the discussion about Why People Stay. According to Maureen, people want to be a part of something bigger than themselves. A firm with a clear vision, good working teams and camaraderie is more likely to retain good employees. In addition, people want to know exactly what is expected of them. This involves leadership skills and knowledge on the part of the supervisor. Be cordial to your employees and have an open door policy so that they know you are reachable.

People also stay if they are well trained. Make sure you have a good, professional training system and that all employees are adequately trained. When possible, allow them to seek opportunities that are outside their core area. Diversity of work promotes learning and engagement, and happier employees. Make sure senior management stays engaged with all employees, even those lowest on the scale. They will appreciate it and will stay motivated employees who might be able to climb the rungs of the firm ladder. Promoting from within is a sure method of retention.

One of the most interesting segments was on How to Retain Your Best Employees. Specifically, Maureen recommended the following:

- Hire the right people in the first place. This is hard to do but with practice and skills over time, it can be accomplished.
- Link your stars to the firm's strategy. If they feel a real part of the development and future of the firm, they will be happier.
- Calculate turnover costs. Don't just eyeball them. Really put numbers to everything from advertising to labor costs. You will be shocked.
- Report these turnover costs to management, so that everyone is accountable, and track them like you would any expense.

(Continued on page 33)



## THE MAGIC OF A MIGHTY MEMORY

By PATRICIA MCGOVERN

This was a most unusual conference seminar on improving one's memory, as Marguerite Ham of Igniting Success, LLC presented "Memory Skills—The Magic of a Mighty Memory."

Our brains thrive on challenge. Trying to remember items, things, people's names, errands, etc. creates issues for most of us. At times like these, it seems that our brain is missing the connection. It has been believed that each of us is born with a set level of intelligence, which is finite. Recent research shows that basic cognitive abilities, such as executive function, can be improved with proper training.

Each of us relies heavily on writing things down to remember them. For instance, when we are going to the grocery store, we make a list so that we will not forget something. This seminar taught us how to remember these lists without writing the items down with pen and paper.

Tell me something and I will forget. Show me and maybe I will remember. Get me involved and I will understand. The concept of being enthusiastically involved is the crux of being able to remember things. Action plus emotion equals recall.

There are three basic types of communication. The most common is visual communication wherein the person generally sees things in pictures. They visualize language. If they need to remember someone or something, it appears in their memory as a picture. The second most common type is the kinesthetic communicator. This person is very touchy and feels their experiences from within. The least popular is the auditory communicator. While we all listen to others, each group focuses on different learning techniques depending on the type of communicator that they are. This also comes into play in how each group remembers certain things or items.

The memory skills techniques in this seminar dealt with using parts of the body. We were instructed to look at and wiggle our toes—this was number one. Number two was to look at and knock our knees together. The next step was to look at and massage our thighs, which was number three. Number four was interesting—we then made believe we had a towel in our hands and we rubbed our rear. Then onto touching and saying that we love our love handles—number five. Onto number

six, which was shrugging our shoulders and number seven was making believe we were cutting our collar with our hand. The next movement was to fondle our forehead—number eight. We went onto number nine which had us touch our head and point upward. Finally, in number ten we circled the ceiling with our hand. We went through these steps a number of times. Each time we would say what we were doing or touching with much enthusiasm. Our instructor indicated that if we were actively involved in the memory process, we would improve our memory skills. Just remembering the ten items above seemed to be a challenge.

If you had a list of errands to do, here is how associating each item on the list with the body part above will work. You have to go to the cleaners. You wiggle your toes and think about the hanger your clothes will be on and smash that hanger into your toes. Next you have to stop and fill your car with gasoline. You knock your knees and think about banging the hose nozzle into your knee. You also have to go to the grocery store. Think of the grocery cart bumping into the muscle of your thigh—massage your thighs. Next on the list is going to the bank to cash a check. Think of rubbing your rear with a towel and getting the money to buy the towel.

Each time you use the body list to recall information, ask yourself the following questions:

1. What do I want to remember?
2. Is it an object? Something tangible, does it create a vivid picture? If not, convert the information into an object that you can see and touch—visualize with emotion.
3. Where is my next available file—body part.
4. SMASH that object into the file with lots of action and emotion.
5. By now you get the idea—you always have to make a connection with what you want to remember. Action plus emotion equals recall. As I said in the beginning, this was a very unusual technique for remembering objects or lists of things. I hope it works for you.

*Patricia McGovern is the Administrator of Beattie Padovano, LLC in Montvale*



## CONSIDERING THE MULTIGENERATIONAL WORKPLACE

BY AMY THORNTON

I was one of the lucky NJALA scholarship winners who attended the ALA conference in Washington, D.C., this past April. The prize came with a price: I was asked to summarize a workshop that I attended at the conference. The one that I am choosing to write is about is “Tapping into the Strengths of Multigenerational Relationships,” presented by Jeri Schultz of Schultz & Associates.

### Generation Gaps in Today’s Workplace: Balancing Multigenerational Relationships

In recent years, there has been an ever-growing trend in workplace diversity known as the “multigenerational” workforce in the legal industry. They are the four distinct Generations: The Silent Generation, born between 1922 and 1945; The Baby Boomer Generation, born between 1946 and 1964; Generation X born between 1965 and 1979 and; Generation Y, born between 1981 and 2000.

To better understand each of these generations, here are some insights into the differences between them:

Members of The Silent Generation are traditional. They want to contribute while they embrace value and integrity; they are less tech-savvy than younger generations. The Baby Boomers are optimistic. They have not learned to relax or are better known as “workaholics.” They choose to stay in the workforce longer and are able to give more and work more. Most law firm partners belong to this generation. Generation Xers (a/k/a Gen X) are determined but flexible. They have seen their parents experience downsizing and are prepared for anything. They hold positions such as junior partner, senior associate, and mid-level support staff. Members of Generation Y (a/k/a Gen Y or Millennials) are confident and open. They are tech savvy multi-taskers and prefer not to work in an office, but be connected remotely on a 24/7 basis. Some positions held by Gen Y are that of entry level associate, paralegal, or law clerk.

The legal industry is hiring attorneys, paralegals, and other legal professionals from each generation as each one brings value and great opportunity, allowing the individuals within the workforce to learn from each other.

What are some differences in their lifestyle characteristics?

- **Communication Styles:** The four generations in the workplace today have their own preferences in how they like to both receive and send communication, as well as how they like to interact with colleagues.
- **Work-Life Balance Styles.** Each generation has different work-life balance needs. The design of flexible work arrangements should meet the specific needs of each of the four generations. For example, leaders need to rethink what work is, and where it can be done.
- **Growth and Development Styles.** Each generation has a different learning style and a preference as to how each likes to obtain information and knowledge. For example, organizations can improve productivity and attract talent by embracing social networking instead of prohibiting its use.
- **Ideas for Providing Recognition and Rewards.** Organizations should consider developing new types of reward and recognition programs in a multi-generational workplace. Some ideas would include rewarding contribution. While traditional workers like concrete symbols of recognition, such as plaques and certificates, people from the Gen Y period prefer other types of recognition, such as time off or upgraded tools for improved job performance.

As legal teams are faced with new challenges and dynamics today, working side by side with colleagues in an age-diverse work environment provides growth opportunities to everyone. Older attorneys can build a rapport with younger attorneys and teach them what they know. Younger attorneys want to be challenged and can teach older attorneys a new way of conducting client business, such as through video-conferencing instead of face-to-face meetings, obtaining the same business results.

When leading an age-diverse team, keep in mind the need to lead differently with each generation. As Jeri Schultz said, “Recruit diverse generations, build diverse teams of generational differences, lead with flexibility and change, adjust with confidence, ask for encouragement, require feedback so that you can change, and most of all, keep in mind what THEY want, your confidence, your commitment, your leadership and your knowledge ... PREPARE YOURSELF TO BE CHALLENGED.”

*Amy Thornton is the Office Manager of Kern Augustine Conroy & Schoppmann, P.C., in Bridgewater*



## TRENDS IN WORK SPACE DESIGN

BY DAN MULLOOLY

As a scholarship winner, I attended the ALA's 2013 Annual Conference & Exposition in Washington, D.C. Of all the great workshops I attended during the four-day conference, "Trends in Space Design and Ergonomics," presented by Steven J. Martin, AIA, LEED AP, was the one I found to be most interesting in relation to my job and space management in the workplace.

Steven Martin focused on the need that law firms have today to change the office landscape. Large luxury offices of the past marked distinction by the size of the office: It was a reflection of one's status within the company. This philosophy has experienced a distinctive shift and today it is more about cost efficient and functional spacing.

Law firms are faced with the fact that to successfully compete, there must be change. This is a reality that is certainly not a phenomenon in any business sector nowadays. There are many new challenges with the changing demands for cost-efficient office space. Martin states many reasons for the economical changes that influenced this fundamental shift, including global recession, value economy, clients distinguishing high value legal work, greater competition for legal work, generational differences, new delivery models, pressure to consolidate and accommodate more in less space, changing ratios and firm composition, changing work styles, and the ability to be nimble.

Downsizing office space in Europe has been a very popular trend these past few years. Some dramatic changes have occurred, including the reduction of office space for partners, moving associates to interior offices, open floor plan, and "hoteling" (i.e., the same workspace utilized by multiple employees working different hours).

Although the United States has not fully adopted the practices currently employed in Europe, Martin talked about the need to do so. California seems to be heading the effort to incorporate many of the European trends in space design and ergonomics. There are marked advantages to changing the styles of law offices, implementing cost efficiency and allowing firms to "do more in less office space." Firms today are typically reducing their leasable area by 15%-40% when renewing or relocating, while still increasing attorney count—and it's done by maximizing the

ways in which office space is utilized.

Martin's discussion included the many physical changes that can help a firm to achieve reduction in office space. Similar to European practices, the changes that Martin discussed which will have significant impact on office function and efficiency, including reduction of partners' office space, moving associates to interior offices, having an open floor plan, and hoteling. Also presented was the shedding of vacant or unused space, using glass office fronts to allow more daylight into offices, reduce all office sizes to 150 square feet, and implementing new workplace strategies by incorporating multi-function rooms that are versatile and able to maximize the use of space. For example, one large room can be used for multiple purposes such as conferences, lectures, banquets, training sessions, or board meetings. The room can be constructed to include A/V capabilities, wireless technology, food and beverages services, etc. Martin's presentation also tapped on integrating food and beverage services, guest services and lounge areas for socialization purposes. He believes, "As firms look to build their culture, network their attorneys, and lend a sense of community to dispersed or mobile workers, spaces that deliberately support casual interaction will become increasingly important."

While the "attorney office" seems to be here to stay in the United States, there could be significant changes in the layout of the firm's space, including the size of attorney offices that can be cost efficient and also increase job performance. As the business world moves forward and adapts to the many changes in technology, the time to change the ways in which we construct our legal offices to stay competitive and profitable has arrived. Martin shared some very interesting and logical means in how law firms can take on the challenges to change the office landscape. He spoke of some very important ways in which to capitalize on space and use it efficiently so that more can be done with less.

I enjoyed Martin's presentation and the many suggestions he shared about incorporating change in the physical work space. It will be interesting to see how the legal industry shifts its landscape towards this trend.

*Dan Mullooly is the Director of Facilities and Operations at Bressler, Amery & Ross, P.C. in Florham Park*



## UP TO THE MINUTE ...

### SUMMARY OF MINUTES OF THE NJALA EXECUTIVE BOARD MEETINGS HELD FEBRUARY, 2013 THROUGH APRIL, 2013

BY DOREEN MARINO

Board Members are Mary Ellen Dolan, President; Audrey Serban, Vice President, Programs; Robbin Dolan, CLM, Vice President, Membership; Michael Harrison, Treasurer; Doreen Marino, Secretary; Gayle Englert, Immediate Past President; Fran Puntillo, CLM, Trustee; Jackie Pampinella, Trustee; Mary Beth Donoghue, Trustee; Mitchell Rait, Trustee; Jim Van Leir, Trustee; Kurt Brown, Alternate Trustee; Nancy Harris, Alternate Trustee; Teri Siegle, Alternate Trustee; and Louise Ruffo, Alternate Trustee.

#### President's Report

The Board has voted to transition the NJALA fiscal year and officer induction to April 1<sup>st</sup> through March 31<sup>st</sup>. This matches the ALA's officer terms and will make coordination between the two entities much more coherent. In order to implement this transition, many changes will need to take place. The Nomination Committee is underway in deciding how best to transition the Board of Trustees. The current Board, including officers, has agreed to continue service until March 31, 2014, if that was deemed best by the Nomination Committee. The Past President's Counsel is guiding the Board on several related transitions needed including, but not limited to, membership dues, Business Partner Exposition, Managing Partner Night, By-Laws, Compensation Survey, Equipment Survey, educational sessions, workshops and socials.

#### Program Sessions

The Board is very pleased that all essential proficiencies for legal administrators have been covered over the last year. Audrey Serban has invested in outstanding topics that are current and needed. The Board has voted to make efforts to reach members who are unable to attend functions, such as offering live webinars. The Board wishes to enhance this ability in the coming year.

#### Workshop Report

Nancy Harris has been focusing on the criteria of essential functions of a law firm and will be focusing on workshop sessions to include timely issues such as records management (going electronic), ethics, negotiating contracts and communication.

#### Community Challenge

Jim Van Leir and Mitchell Rait have scheduled a Habitat for Humanity to be held on June 8<sup>th</sup>. The work will be dedicated to a Morris County Habitat House where 20 members will participate in the building of a home in need. Since this project looks to be a great success, the Board recommended that another similar project be slated for the Fall of 2013.

#### Newsletter

In conjunction with the transition of co-editors in June of 2013 when Elli Albert and Anita Setaro retire from those responsibilities, Robbin Dolan and Doreen Marino will assume the positions as co-editors. The Board has unanimously voted to bring the newsletter to members in electronic format, saving the membership considerable money. Over the next year, the new editors will be introducing, and then enhancing the electronic newsletter format. There will be a focus on increasing Newsletter Committee membership.

#### Financial Report

NJALA has successfully completed the 2012 Audit, which was conducted by Michael Sikora. The Board clarified that when issuing payments, any check over \$1,000 requires the signature of two officers. In addition, any check made payable to the board treasurer, regardless of amount, needs to be co-signed by an officer. Michael Harrison confirmed the procedure is strictly being followed. NJALA's financial report is on target. More money has been invested in educational sessions, which is in response to the membership desires.

#### Socials

The volunteer and business partner appreciation night has been scheduled for April 30<sup>th</sup> at the Classic Thyme Cooking School in Westfield. The June Social has been scheduled for June 12<sup>th</sup> and various entertainment vendors are being interviewed.

*Doreen Marino is the Human Resources Director of Lerner David Littenberg Krumholz & Mentlik, LLP in Westfield*

# What's on Tap

## ALA and NJALA 2013 CALENDAR OF EVENTS

**Monday, June 17, 2013 (12 noon-7 pm)**

The **8th Past Presidents' Golf Outing** is again sure to be a great event! Whether you are a novice or experienced golfer, join fellow NJALA members and Business Partners for an afternoon of food, drink, golf and fun!

**Wednesday, July 17, 2013 (2:00 pm)**

**ALA Webinar.** Topic: "Negotiate the Lease: Maneuver the Maze of Real Estate Options," presented by Elizabeth K. Cooper, J.D. of Jones Lang LaSalle, Brokerage, Inc. CLM credit available.

**Wednesday, August 21, 2013 (2:00 pm)**

**ALA Webinar.** Topic: "Financial Reporting Methods that Allow Intelligent Business Decisions," presented by Barry Jackson, CLM, CPA, of Seeger Weiss LLP. CLM credit available.

**Wednesday, September 18, 2013 (6-8:30pm)**

Join us as the **Business Partner Expo** returns to Mayfair Farms in West Orange. One of the highlights of the NJALA season, the Expo gives the opportunity to network with Business Partners and peers, to view new products and discover new services in the legal industry.

**Tuesday, October 8, 2013 (6-8:30pm)**

**Monthly Meeting and Workshop** at the Highlawn Pavilion in West Orange. Topic: TBA. A buffet dinner will be served.

**Tuesday, November 12, 2013 (6-8:30pm)**

**Monthly Meeting and Workshop** at the Highlawn Pavilion in West Orange. Fan Favorite Michael Cohen, Esq. will return to the NJALA. Topic: TBA. A buffet dinner will be served.

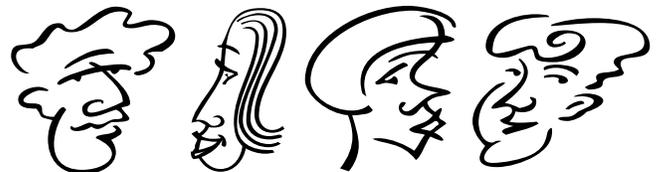
**For information about:**

**Monthly meetings** – Please contact Audrey Serban of Fisher & Phillips at 908-516-1061.

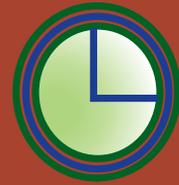
**Educational Workshops** – Please contact Nancy Harris, Gordon & Rees at 973-549-2500

**NJALA Socials** – Please contact Jackie Pampinella of Fox Rothschild at 973-992-4800.

**ALA Webinars: Registration and general information is posted on the ALA site, [www.alanet.org/education/regconf/telesem.html](http://www.alanet.org/education/regconf/telesem.html).**



# A Quarter Past



## January, 2013

The Monthly Meeting Educational Session was held on Tuesday, January 8, 2013, where Neen James of Neen James Communications opened our eyes to the “Secrets of Super Productivity for Legal Professionals.” In this interactive educational session, members had an opportunity to understand daily obstacles preventing legal administrators from being super productive, and explored ways in which to conquer those obstacles.

An educational workshop was held on Tuesday, January 29, 2013 at Saiber LLC in Florham Park, where we heard about the timely topic of “Managed IT Support: Ensuring The Continuation of Operations.”

## February, 2013

The Monthly Meeting Educational Session was held on Tuesday, February 12, 2013. Kenneth Winslow and Matthew Schwartz, both partners of Bederson & Company, LLP, presented “Checks and Balances—Real Fraud Stories of New Jersey.” Members were educated through real war stories from the files of a forensic accountant. In this program, members learned how to protect firms and implement a system of checks and balances as it relates to vendor payments, payroll and trust accounting issues. See the related article in this edition.

## March, 2013

The Bill and Phil Show ran at the monthly meeting educational session, which was held on Tuesday, March 12, 2013. William Ramsey of Neal & Harwell, PLC and Phillip Hampton of LogicForce Consulting presented “Bring on the Bling—Technology Gadgets and Apps To Make You a Star.” Members viewed Bill and Phil’s annual showcase of the latest and greatest technology apps, gadgets, and other resources for legal professionals.



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## PARSLEY, SAGE, ROSEMARY AND “THYME”

BY KURT BROWN

Yes, that is the title of the popular song recorded by Simon & Garfunkel back in 1966, but that is not the subject matter of this article. Instead, these are just some of the ingredients we were cooking with on Tuesday, April 30, 2013, when we marked our annual appreciation celebration for our NJALA business partners and volunteers.

As in prior years, we once again descended upon Classic Thyme Cooking School in Westfield, New Jersey, with a total of 32 attendees, comprised of our business partners and chapter members. On this night, however, we turned a small section of Westfield into a Tuscan Italian village. Tuscany is known for its beautiful scenery, rich history and most of all its delicious food.

The night began with a program introduction by Chef David P. Martone, owner and Executive Chef of the school. Chef David was classically trained at the French Culinary Institute under the direction of world renowned Chefs Jacques Pepin, Andre Soltner and Alain Sailhac. Some of my fellow chapter members know that I too was trained at this prestigious cooking school. Later in the night, Chef David and I were able to reminisce a little about some of the same Chefs we studied with at the school.

Our menu this night included the following:

- Panzanella (Bread and Tomato Salad)
- Tortellini with Light Orange Lemon Cream Sauce and Pink Peppercorns.
- Spicy Pink Sauce with Green Olives, Ground Turkey and Pepperoncini
- Braised Tuscan Chicken
- Roasted Rosemary and Shallot Steaks
- Sauteed Escarole
- Tiramisu

After our initial introduction and instruction, we formed seven groups to make the menu items listed above. My team took on the “Roasted Rosemary and Shallot Steak” recipe. Our team consisted of Business Partners Kim Gentile (MCS Management Services), John Sabates (Capital One) and fellow chapter members Jim Van Leir and Joanne O’Beirne.

Before you start any recipe it is best to review the ingredients and instructions. The French have a phrase called “mise en place” (pronounced *miz on plas*). Loosely translated, it means “putting in place” as in set-up. In professional kitchens, this means all ingredients are prepped and arranged before you prepare the meal.

With only seven items in our recipe (including olive oil for searing and salt & pepper), you think it wouldn’t be that special or flavorful. Wrong! The secret is in the ingredients and the way it is prepared. The other five ingredients included filet mignon, garlic, shallots, rosemary and demi-glace.



The recipe called for 12 garlic cloves and 12 shallots. Two interesting discussions developed over these two simple ingredients. The first was what is the difference between a bulb (or head) of garlic and a garlic clove? In the simplest of terms, a clove is one segment of the bulb.

Another discussion point came up as to what exactly is a shallot? A shallot is in the allium family, just like onions and garlic. The biggest difference is that they are less bitter and milder. Used often raw in vinaigrettes or when slow cooked or roasted, they develop a sweet side.

Only three more ingredients to prep (rosemary sprigs, veal demi-glace and the steaks). The recipe called for four rosemary sprigs, each three inches long. Who has a ruler? Seriously? The purpose of the rosemary was to infuse the flavors into the sauce we are making, so any size would do. Now for the steaks. The recipe called for shell steaks. The Chef had decided to substitute a whole beef tenderloin that he cut up into thick filet mignon portions. Finally, the last ingredient, the demi-glace. Demi-What? Demi-glace (pronounced *demi-glass*) is made by reducing equal parts of brown veal stock and brown veal sauce (veal stock thickened with a dark roux and tomato paste). Lucky for us, the Chef provided us with a packaged concentrate that simply reconstitutes with water.

Now that our “mise en place” was completed, it was time to cook. (But wait, perhaps time for a glass of wine.) First, heat a large sauté pan with olive oil to almost the smoking point (this assures a very hot pan needed to sear the steaks). Generously

(Continued on page 32)



*(Continued on page 32)*

## Parsley, Sage, Rosemary and “Thyme”

(Continued from page 30)

season the meat with salt and pepper. Brown several pieces at once but do not overcrowd the pan. Overcrowding doesn't allow your food to brown but rather it steams. Work in batches, if necessary.

When you are done browning the meat, remove from the pan. Add the garlic, shallots and rosemary sprigs to the pan and cook until the garlic is lightly browned and the rosemary is wilted and gives off a strong fragrance. Deglaze the pan with the veal demi-glace. Deglazing the pan means to add a liquid (in our case the demi-glace) to the pan to loosen the food particles (known as *fond*) stuck to the bottom. It is best to do this with a wooden spoon. This adds to the flavors of your sauce. Return the steaks to the pan, cover and continue cooking until the meat reaches an internal temperature of 125 to 135 degrees. Delicious—and that was just one of seven dishes prepared during the evening!

It was a fun evening filled with laughter, wine, story sharing and, of course, eating. We joked about whether the chicken prepared by Teri Siegle was better than the chicken that Jim Wostbrock made. Mark Shore was told to “push” the ingredients in his pink peppercorn sauce rather than to stir it. Rocco Marotti carefully watched to see if the moisture evaporated while he cooked the ground turkey. Helen Lysaght was called up to the cooking area thinking she was in trouble with the Chef. Finally, we listened to endless comments by Gayle Englert and Fran Puntillo about how good the Tiramisu was (no surprise, they were on the Tiramisu team!). I joked with Gayle that if the Chef was using fresh ladyfingers, how come she still had her digits.

I would like to thank our Business Partners who participated in the evening and who continue to support NJALA. In attendance was Ken Winslow (Bederson & Company); Fred Levine (Canon Business); Gabriella Hermey (Millicare DriKlean); John Sabates (Capital One); Kim Gentile (MCS); Mark Shore (Atlas Consulting); Rich Balasa (USI Affinity); Rocco Marotti (CohnReznick); Will Robertson (UPS); Brian Busichio (DTI); Joe James (Micro Strategies); Rebecca Day (KAD Associates); and Steven Pietrucha (Canon Business).

Representing our volunteers were Jackie Pampinella, Angela Segal, Anita Setaro, Audrey Serban, Doreen Marino, Elli

Albert, Fran Puntillo, Gayle Englert, Helen Lysaght, Jim Van Leir, Jim Wostbrock, Ken Bailey, Mary Ellen Dolan, Michael Harrison, Nancy Fosina, Sarah Clark, Susan Weinreb, Teri Siegle and Joanne O'Beirne. Apologies to any business partner or volunteer in attendance whose name may have been inadvertently omitted.

Special thanks to Audrey Serban and Jackie Pampinella for planning this wonderful event and, of course, thanks to our host for the evening, Chef David, and his wonderful staff.

Bon Appétit.

*Kurt Brown is the Executive Director of Einhorn Harris Ascher Barbarito & Frost, P.C. in Denville*

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## Retaining the Best

(Continued from page 22)

- Consider what makes people stay. Above all, *ask them*. Of course it may be hard to draw the accurate answer out of them, keep doing it until you have a clear picture. This will help in planning and future recruitment.

Maureen also recommended that hiring assessments be done so that hires are a right fit. Psychological assessments are widely available, such as the Myers-Briggs Type Indicator, to see how individuals might fit in. In addition, she recommended that firms conduct a Culture Assessment, designed to assess person to firm fit, a predictor of job satisfaction.

Finally, she suggested all firms Rank Your Employees. This was a new concept to me. No two employees are alike and although it may be hard, they should be ranked so that you know where to focus your retention efforts.

In conclusion, the session really made me take a step back and evaluate how I treated my stars. The first thing I did when I got back to the office was make sure both of my assistants got to attend the bar association secretary's lunch for Secretaries Day. Usually one of them has to stay behind to answer the phones. This time, I did it. It was scary being a Receptionist for a few hours, but well worth the effort to do one little nice thing for my "stars."

*Robbin M. Dolan, CLM, SPHR, is the Office Administrator of Laddey, Clark & Ryan, LLP, in Sparta*

## Managing Partner Expectations

(Continued from page 14)

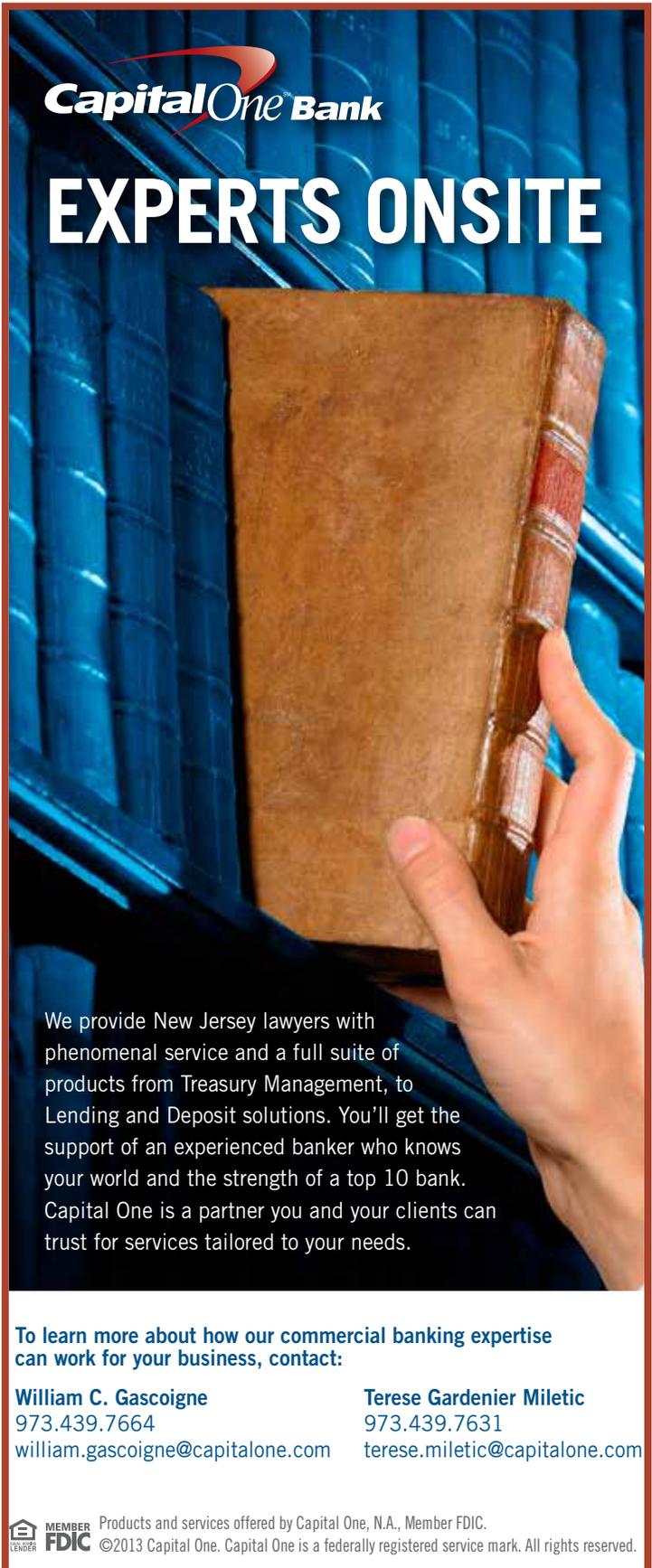
"Client revenue overall is tracked and analyzed using a software tool we had customized to generate the reports we need (client revenue and realization by niche, by office, by partner, etc.)."

My colleague, Gabriel Caponetto, Manager of New Business Development for Citrin Cooperman in Livingston, has an effective program for managing partner expectations around new business development. In the sales management domain, this process is called activity management, which is the regular procedure of inspecting what you expect. Every two weeks Gabe meets with partners in his office to analyze what actions he and the partner have taken to accomplish business development results.

### In Sum

Were we all to take one piece of learning from the Great Recession, it would be the necessity of reconfiguring our working relationships inside the firm so that we all reach our best expectations.

*Christine S. Filip, Esq. is the Director of Business Development at Saiber LLC in Florham Park*



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## MARKETING FOCUS— SUPPORTING THE SALES FORCE

BY ED MILLER AND SHANA GILLIS



I'm often asked, "What exactly do you do?" My answer always sounds something like this: "I support my firm's sales force." A law firm with a sales force? Yes, the attorneys are our sales force. The marketing department's chief function is to give our sales force all of the necessary tools to do their job better. And by doing a "better job," I mean directly getting new clients, providing superior service to existing clients, cross-selling services to existing clients, building strong relationships with referral sources, and building a solid reputation in the marketplace. The focus of this article is to provide some ideas on how a legal administrator can ensure the success of his or her sales force without the aid of a well-trained and staffed marketing department.

When working with an attorney, the first step I take is to help them create a personal biography. To me, this bio spells out exactly what the attorney has to offer and includes specific language that speaks directly to potential clients. This may include information about a particular industry where the attorney has expertise, specific examples of matters handled and the outcomes, and other accomplishments that tangibly verify the claims made in the bio. The attorney is not only the salesperson, but also the product/service provider.

The bio should make it clear what the attorney has to sell and why he or she is the best person to hire to fulfill a specific need. The bio should be available in both hard copy and electronic versions, posted on firm website, and in a format easily changed to address a specific need. Each attorney bio should be distributed to other lawyers in the firm so that the sales force is fully educated about other services the firm can provide. As an administrator, make sure each attorney has a clear message (the bio) and all attorneys are aware of the capabilities of every other lawyer. Ask yourself, how can one effectively cross-sell if they are not aware of the other services available within the firm?

Once I am fully educated on what an attorney has to offer the marketplace, I develop public relations strategies to help that attorney become known as the "go to" lawyer in their particular field. Implementing these strategies is less daunting than it seems. For example, say one of your lawyers has a particular expertise in the widget manufacturing industry. Research what publications widget companies' decision-makers read. Call or write to editors to introduce your lawyer expert and make an introduction for them to communicate. More often than not, you will make a successful connection.

Once the connection is made, stay on top of your lawyer to keep in touch, including offering to write articles for the publication or commentary regarding industry trends. This type of focused PR will properly position your salesperson and lead to more opportunities in the widget market. I ask, doesn't this sound more compelling than a basic press release announcing that a lawyer was named to a committee of the local chamber of commerce?

Changing gears slightly, any decent salesperson needs good data. The administrator can help his sales force by becoming the knowledge center of the firm. As mentioned earlier, completely understand all of the firm's capabilities. As the knowledge center, you are the connector or facilitator. From your perspective, you should point your sales force in the right direction for cross-selling, speaking, writing, and networking opportunities. This also means providing them any other information that will help them do a better job, like making yourself available or assigning somebody to conduct research for the salesperson on a specific company, person, industry, competitor, and/or trend to better serve existing clients or obtain new ones. The informed salesperson is the successful salesperson.

While there are so many other things you can do to support your sales force, my final recommendation is to work with your lawyers to help keep existing clients satisfied. Help come up with value-added ideas, such as free educational programming and entertainment ideas, create a clear and concise billing template, ensure accessibility to lawyers through smartphones or other technology, and create a mechanism to address client service problems. Too often, the lawyer is the last person to know when there is a problem with the client. Keep an open dialogue with the lawyer to gauge his or her understanding of each client's satisfaction level.

Since the legal administrator must wear many hats, serve many masters, and is often stretched beyond thin, consider hiring a full-time marketer to assist the sales force. If that is too much for the firm to digest, bring in a consultant to help create systems. At the very least, the administrator can distribute tips, articles and other recommended reading to the sales force. After all, if you can teach the lawyer sales force just a little bit about marketing, your whole firm will benefit greatly.

*Ed Miller is the Chief Marketing Officer, and  
Shana Gillis is the Marketing Manager, of Norris  
McLaughlin & Marcus in Bridgewater*



## NJALA COLLABORATES WITH NJSBA

BY SARA DIAZ

The New Jersey Association of Legal Administrators once again took part in the New Jersey State Bar Association's Annual Meeting and Convention on May 15-17, 2013, at The Borgata Hotel and Casino in Atlantic City. I was very honored to take part in this year's Bar' Annual Meeting and Convention in Atlantic City since my Managing Partner, Ralph J. Lamparello, was installed as the 115th Bar President.

As in previous years, several NJALA members who participate in the NJSBA's Law Office Management Committee (LOM) again organized and moderated programs addressing topics related to law firm management. This year's LOM program track, all offering CLE credit to participants, were:

- **Protecting your Client's Data/Disaster Preparedness:** addressing best practices for law firms to protect client data and using the latest technology to survive a business interruption.
- **Recent Developments in Employment Law:** covered many recent developments in employment law, including gender equality, the Equal Pay Act, recent wage and hour developments, NLRA/NLRB rulings and social media restrictions.
- **Ethical Business Development to Improve Client Service in the Virtual Age:** addressed the the change in the Bona Fide Office rule and increasing reliance on the Internet and how search engine optimization extends the power of communication and referral building exponentially.

**Ethics Update for Lawyers:** a review of the year's OAE/OAA decisions and opinions and a summary of lawyers' ethical responsibilities in the practice of law.

**New to the Legal Field? How to Arm Yourself for your Future as a Lawyer:** a program designed to help young attorneys with a variety of challenges they face as they get established in the legal industry.

In addition to organizing and moderating programs at the NJSBA Annual Meeting, NJALA also exhibits at the Annual Meeting. We share with conference attendees information about ALA and NJALA and convey our mission to support law firm managers. Exhibiting at the Annual Meeting exposes our group to several hundred conference attendees, including judges, attorneys, and others in our field. During the last five years, we estimate meeting over 1500 individuals at this conference.



In addition to our participation at the Annual Meeting each year, NJALA members have been asked to lead several programs throughout this past year for NJSBA. Among them, NJALA members presented two programs at the Bar's *Technology Symposium* in August, 2012, where our members discussed current technology trends to succeed in private and trial practice as well as internet marketing.

In February, 2013, an NJALA member developed and presented a program titled *Law Office Management 101: Stop. Making Sense of the Business of Law*. It was a practical introduction for new attorneys to key issues for the running of a law firm, including basic economics of law firm business, important ethical considerations for early practitioners, and marketing steps for new attorneys. Our members organized and presented these programs alongside attorneys and judges for the benefit of NJSBA members.

We hope to see more NJALA members join our Bar efforts in the future. As more members get involved and share their knowledge and expertise in law firm management with others, we raise our profiles and gain more support for our roles at our law firms.

*Sara Diaz is the Director of Administration at Chasan Leyner & Lamparello, P.C. in Secaucus*



## PRESENTING... OUR BUSINESS PARTNERS

BY MARY ELLEN DOLAN AND NANCY FOSINA



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(Continued on page 38)

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(Continued from page 37)

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**TRENDS IN LEGAL OFFICE SPACE:** As we have collaborated with our clients over the last several years, a number of trends have begun to evolve which will continue to shape the approach to the legal office environment for years to come. The broad emphasis of these trends is all about

the efficient use of space and creating flexible environments that increase collaboration and space utilization.

Some of the specific trends are: the reduction in the overall office size; more uniform office sizes; flexible meeting rooms and conferencing spaces; centralized meeting spaces for ease of control and scheduling; casual gathering and collaboration spaces; smaller or eliminated law libraries; less paper filing and more electronic file storage; more open environment and workstations for the administrative staff; and refreshed modern interiors that often integrate the firms branding.

Understanding these trends and working collaboratively with a design professional on renovations or relocation can lead to efficient office spaces that are more cost effective and appealing to clients and attorneys alike. The overabundance of office space in the current market still offers many firms the opportunity to take advantage of these trends in either relocation or renovation efforts. Careful analysis can demonstrate which approach may provide more benefit to a specific firm.

For more information or help, please call Stephen Quick at Parett Somjen Architects (973-586-2400 x 202). Stephen and our 40 person firm will be Happy to Help!

*Mary Ellen Dolan is the Office Administrator of Greenberg Traurig, LLP in Florham Park*

*Nancy Fosina is the Administrator of Maraziti, Falcon & Healey, LLP in Short Hills*



# HATCHES, MATCHES & DISPATCHES

BY CINDY LANDIS

The winter is behind us; finally. As I look outside, the sun is peaking through the clouds and the flowers are starting to bloom. We wait months to see this day: It has arrived.



*Cindy's dad, Rocky Caruso, surrounded by his clan*

As I write this edition of HMD, I look back at what has happened during the past few months. My father turned 90 on February 23, 2013. He asked for a dinner with just immediate family, which was celebrated on March 3, 2013. His three daughters, husbands, nine grandchildren (of

fourteen), two great-grandchildren and a few close friends (who are just as much a part of our family as the rest of us) were in attendance. It was wonderful to see the smile on his face as he wore his "party hat."

My daughter, Carol, and her husband, John, are the proud owners of their first house in Chestertown, Maryland. Do you remember your first home? The excitement to come home and open up the front door and think...this is ours?

My son, Steven, attended the regional mock trial competition in New Hampshire. His team went home a first-place winner. The three team members and coaches then flew to San Antonio, Texas, in April to compete at the national level. Although they did not win, he was thankful for the opportunity, and is hoping to have the chance again next year. After his return home, he was asked to be the president of the Mock Trial Executive Board, which he gladly accepted.

And now from other NJALA members:

**Ron Henry (Wilentz Goldman & Spitzer)** became a grandpa, courtesy of daughter Amanda, who lives in Leipzig, Germany. Amanda blessed Ron and wife Donna with twin grandsons, Andre Lewis Bazin and Oscar Denis Bazin. Of course, Ron and Donna had to trip over to cuddle with them in April. Donna will be flying back to Germany in June to help out with the boys, while son-in-law Pierre Louie attends a conference in Seattle.



*Donna Henry with Andre and Oscar*

In other family news, Ron's son, Christian, daughter-in-law, Liz, and granddaughter, Norah, are moving from Cambridge, MA to the island of Eleuthera in the Bahamas in August. Thank goodness the air traffic controllers' furloughs are over.

Donna Sanders (**Weinstein Lindemann & Weinstein**) reports that her daughter, Lauren, will be graduating high school in June and attending Morris County College in the fall. Lauren, a competitive horseback rider, has decided to stay local so that she can continue to train with her



*Lauren and Spike*

new horse, Hunting for Privacy, a/k/a "Spike," for next year's Appaloosa Youth World Show in Fort Worth, Texas. Lauren has received many Championships and Appaloosa Horse Club Honors, including the 2011 Youth Achievement Award and four varsity letters from the United States Equestrian Foundation. Congrats and best of luck to Lauren and Spike!



*The three Annelo college grads*

**Annette Anello (Day Pitney)** has three children graduating from college on May 18 and 19, 2013. Son James will be receiving his B.S. Accountancy from Villanova University School of Business. James will start his accounting career with

*(Continued on page 40)*

## Hatches, Matches & Dispatches

(Continued from page 39)

PricewaterhouseCoopers in Stamford, CT in September. Daughter Jennifer will be receiving her B.S. in Management and Finance from Providence College. Jennifer will start her Human Resources career with M&M Mars in late June. Last but not least, daughter Alexandra will be receiving her B.S. in Business Administration with a concentration in Human Resource Management and Marketing from Fordham University, Gabelli School of Business. Alexandra is currently interviewing with a few major NY companies and hopes to start her Human Resources career in late June as well. We at HMD are pretty sure that Annette is happy to be done with all of those college tuition payments!



*Judy celebrates son John's First Holy Communion.*

### Judy Sotardi

**(Forman Holt)** has had quite a busy month! Son John made his First Holy Communion on May 4th, and her daughter, Erica, is graduating from Louisiana State University on May 17th with a degree in early childhood education. Judy and

family are looking forward to having a crawfish boil at her graduation party in Baton Rouge!

**Audrey Serban (Fisher & Phillips)** is very excited for two events that she signed up for in the Spring and Fall. The first is the Revolutionary Ramble which is a bike ride throughout NJ, which commemorates different Revolutionary historical places and events. She has also signed up for the Iron Girl Sprint Triathlon in September in Sandy Hook, NJ. This year, Audrey's goal is to beat her personal best time. Best of luck, Audrey, we know you can do it!

**Jim Van Lier's (Epstein Brown & Gioia)** youngest son, Alex, started chef training at the New England Culinary Institute (NECI) in Montpelier, VT, on April 2. Co-incidentally, Jim's daughter is in grad school at UVM in Burlington, so they can hang out when time permits. Alex's training also nicely complements that of Jim's oldest son, Joel, who is a sommelier. The combination makes for great meals when all the kids are home.

I wish you all a fun-filled summer. Take some time for yourself; take some time for family and friends. Work will always be there tomorrow.

*Cindy Landis is the Office Administrator of Gennet Kallmann Antin & Robinson in Parsippany*

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## Q & A: TODAY

BY ANITA SETARO

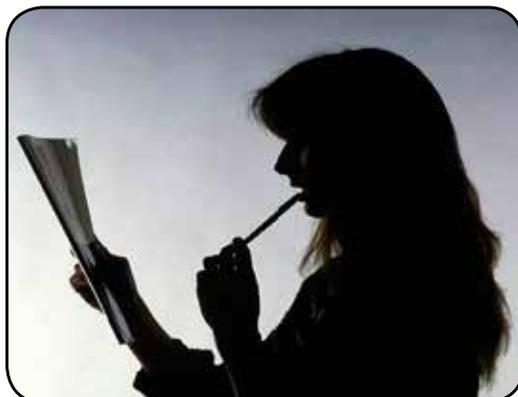


**Just when we thought things were on the upswing, we hear of another firm laying off staff and attorneys – has your firm considered any restructuring plans to maintain your staff?**

**Karen Steinberger of Saiber LLC:** We continually monitor our staffing. Recently, when one of our legal assistants moved out of the area, we took a look at our ratios and decided to re-arrange staffing so that we did not hire a replacement. It's always a balancing act.

**Jim Van Leir of Epstein Brown & Gioia, LLC:** We survived a 20% reduction of hours and have had everyone back to 35 hrs. for over a year now.

**Patricia E. Bean of Brach Eichler LLC:** We continually seek opportunities to improve attorney/secretary ratios whenever possible. I am aware of firms with younger attorney demographics achieving a 5:1 ratio with the right technology. As such, this trend will continue over the next few years.



**Joanne O'Beirne of Wolkstein, Von Ellen & Brown, LLC:** We are already small. Each of three partners has one paralegal and one of the paralegals handles her partner and two associates, so we are tight.

The following firms all responded that things were status quo and no changes were contemplated: **Kathy Dart of Keefe Bartels, Kathy Reuter of Fein, Such Kahn & Shepard, P.C., Helen Lysaght of McManimon, Scotland & Baumann, LLC, James Abbatemarco and Karen Hess of Peckar & Abramson, P.C., Karen Hooyer of Robert T. Corcoran, P.C., Ken Bailey of Fishman & Callahan, P.C.**

*Anita Setaro is the Office Manager of Duane Morris, LLP in Newark*

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OR IF YOU WANT TO BE PART  
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WE WOULD LOVE TO HEAR FROM YOU!**

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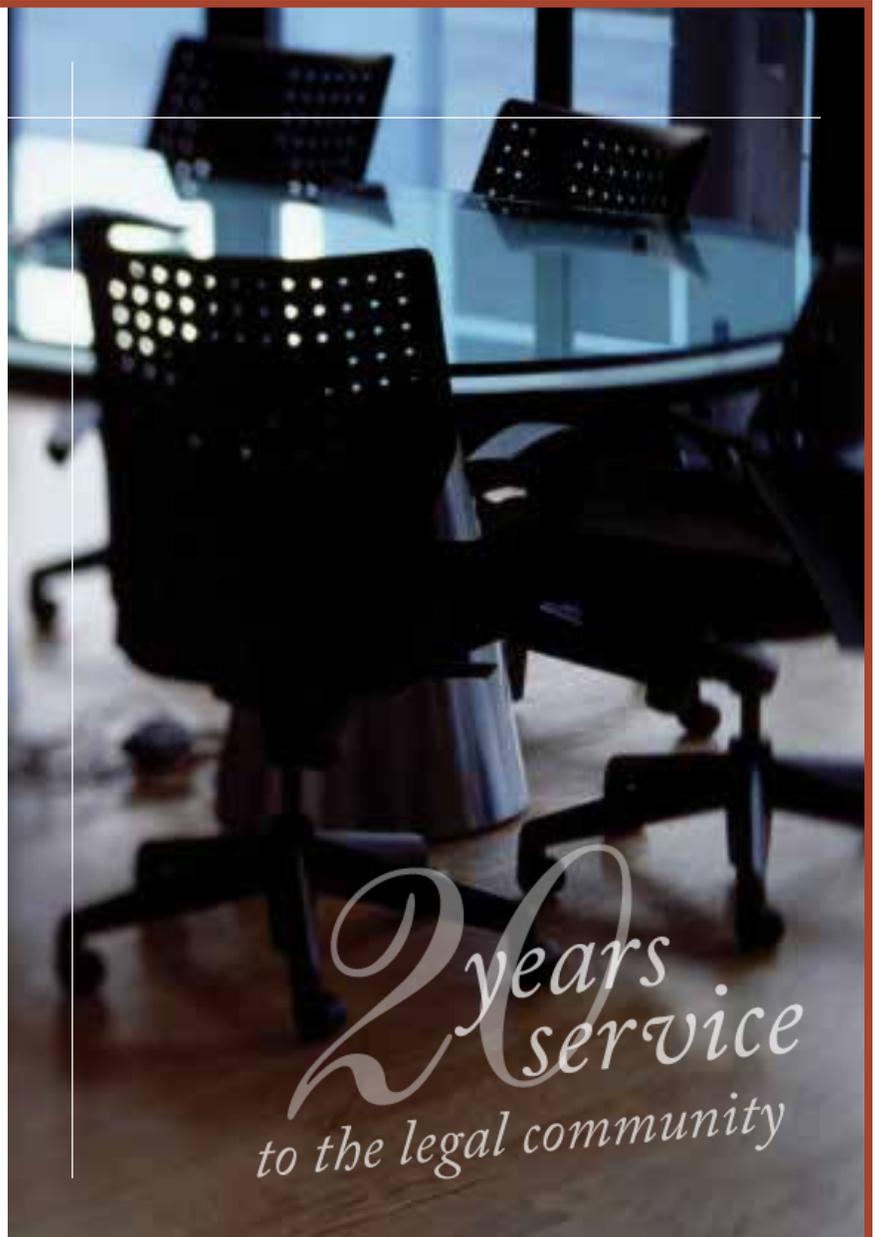
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