Wisconsin

A Chapter of the Association of Legal Administrators

CLASS ACTION

Spring 2018

Welcome to the Wisconsin Chapter of the Association of Legal Administrators (WALA) Newsletter.

WALA provides information for not only current members, but also valuable information for prospective ALA and Wisconsin Chapter members (ALA membership required in order to join Chapter). Information is available for attorneys, legal management directors, legal management department directors/managers (finance, human resources, facilities, marketing and information technology) and legal industry business partners and service providers. Legal departments and law firms, once solely managed by attorneys, now turn to legal administrators for support and enhancement of the practice of law.

CHAPTER EVENTS

CHAPTER NEWS

BOARD MEMBERS

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Wisconsin Association of Legal Administrators
Members, Business Partners, and Friends

You are invited to…

WALA's 40th Birthday Party!

with appetizers, pizza, beer, cocktails, soda, and bowling at

Rock & Bowl Hall of Lane
511 East Racine Street (Highway 18)
Jefferson, Wisconsin

from

5:30 to 8:30 PM

on

Wednesday, April 18, 2018

WISCONSIN ASSOCIATION OF LEGAL ADMINISTRATORS

Prizes for best game, best series, most improved bowler.

PRESIDENT'S MESSAGE

Mark A. Bridgeman, CLM, CRM, Information Governance Officer, U.S. Attorney's Office

I have learned that... We should never limit what we can accomplish.

A few years ago, I was asked to rejoin the WALA Board of Directors, as we reinvigorated member and business partner engagement and created new innovative and exciting programs. As our beloved chapter celebrates its 40th Anniversary, I am very pleased I accepted that "call to leadership." As a result, I have joined a team of fervent, dynamic and committed chapter and law firm leaders and volunteers to work with as our chapter embarks on a journey to provide the best educational programs and social networking opportunities, and to embrace the passion of excellence. Together we answer the call and we will bring only the best value to our members and offer continued and unwavering support for our business partners, as we continue to elevate our profile in the legal community and within ALA.

While Sue Thome-John has left me with some big shoes to fill (sorry, I will not be wearing the classy heels she does) with all that has been accomplished this year, I am very confident that we will only continue to raise the bar to new and exciting heights. Here is a sneak peek at what you can expect.

We will be celebrating our 40th Anniversary all year long at our meetings and events. Our Board theme this year is "Engage with Membership and Business Partners, Ignite with Leadership and Value our Volunteers".

We have a lot in store this year, as we celebrate our 40th anniversary. We are currently interviewing students at Marquette Law School for our brand new internship program. We are developing Emerging Leaders and Next Generation Leadership programs. The idea of these programs is to mentor upcoming leaders in our chapter, as they volunteer to take on new leadership roles and to enhance the development of young management professionals in the legal industry. We also want to listen to these groups, along with all of our members to help maximize ALA and chapter membership.

This year the chapter has selected the Wounded Warrior Project as our charity. We are in the process of working with dynamic speakers on current legal management trends for education and speaking opportunities at our Annual Conference of Education (ACE) and the renewed and reinvigorated Managing Partner program on October 4, 2018. Our ALA President, April Campbell will be joining us for these programs.

Our Spring Social (April 18th) and Fall Social (November 8th) are always a member networking favorite. This year's events are presently in the design stages and will undoubtedly be another grand slam with our membership.

We are increasing our engagement with the Wisconsin State Bar. We plan to collaborate with them in both our chapter educational programs and social events, and by offering our expertise in legal management to increase our visibility in the legal community in Wisconsin.

We are updating our chapter logo design to be more modern and descriptive of who we are and what we do to support the legal community and to help attract new members.

We are completely redesigning on our chapter website for easier user functionality and increased capability. It will be launched very soon. In the interim, a link to the current chapter website can be found here.

As you can see, there are a number of great things on the horizon for 2018-2019, and I have barely scratched the surface. We can help members work toward their Certified Legal Manager (CLM) designation. This education and designation will only benefit our members and their firms/businesses.

Obviously none of what we do in our chapter could be accomplished without the generous support of our business partners. I want to take this opportunity to thank them for their continued support of our chapter throughout the years.

Last, but not least, none of what I will be doing this year, as your president, would be possible without this dynamic team of volunteer leaders:

President-Elect: Kathy J. Pline, Executive Director, Boardman & Clark, LLP

President-Elect-Elect: Bridget Lueck, Office Manager, Reinhart Boerner Van Deuren s.c.

Past President: Sue K. Thome-John, Office Administrator, Wilson Elser Moskowitz Edelman & Dicker, LLP

Secretary: Holly G. Coyle, Accounting Manager, Murphy Desmond S.C.

Treasurer: Kevin K. Lawrence, Office Administrator, Parrett & O'Connell, LLP

Co-Vice President - Business Partners: Bridget Lueck, Office Manager, Reinhart Boerner Van Deuren s.c.

Co-Vice President - Business Partners: Maribeth Karpinski, Firm Administrator, Lindner & Marsack, S.C.

Vice President - Education: Jessica A. Beyer, Office Manager, DeWitt Ross & Stevens

Vice President - Communications: Pamela M. Zacharias, Firm Administrator, Meissner Tierney Fisher & Nichols SC

Vice President - Membership: Sandy Schmitt, Office Administrator, Galanis, Pollack, Jacobs & Johnson, S.C.

Vice President - Special Projects: Aly Lynch, JD, MPS, Founder, Next Step Legal Consulting LLC

Thank you for your dedication and commitment to excellence. I value and respect your volunteer leadership. Together we will make a difference. I will begin each quarterly newsletter with “What I learned,” as a leader in my job and profession and I will end each newsletter with a Best Practice for Chapter Leadership that I have learned over the past 11 years as a member of WALA leadership.

My Best Practice for Chapter Leadership #1: Stop and listen to what your teams have to offer for continued success. Application of this best practice will result in learning more about your team, their skills and innovation, and how they will be able to take success for the chapter to the next level.

PAST PRESIDENT'S MESSAGE

Sue Thome-John, Wilson Elser Moskowitz Edelman & Dicker LLP, Milwaukee

I wish to thank all of you for the opportunity to serve this chapter as its president this past year. As I look back, I do so with a great sense of accomplishment for everything that we have achieved together! It takes many volunteers working collaboratively to make great things happen!

We took a big risk last year by trying to offer a new premier event to our membership in lieu of our annual conference of education. The idea stemmed from weaving together community service, teamwork involving business partners and members, friendly competition and a shared goal. The result: WALA's East vs. West Big Hearts Campaign and raising over $12,000 to benefit the Stars and Stripes and Banner Honor Flights! Congratulations to everyone who worked tirelessly and creatively to achieve this goal.

Our membership committee, led by Vice President of Membership Sandy Schmitt, started many new initiatives including a campaign to reach 205 firms in Wisconsin that are not currently involved in WALA, a new student internship program with Marquette University, and a new video soon to be added to the website featuring testimonials by members about membership benefits. The result: 11 new members!

The Cindy Johnson Legal Management Scholarship was established in memory of Cindy to recognize her dedication to WALA for over 30 years as both a member and a business partner. This scholarship will be awarded annually at the spring social. The winner will be chosen from those members submitting written applications, and the winner will receive registration and a travel stipend to the ALA Regional Legal Management Conference.

As president, I had the honor of recognizing two individuals who have contributed greatly to WALA's success:

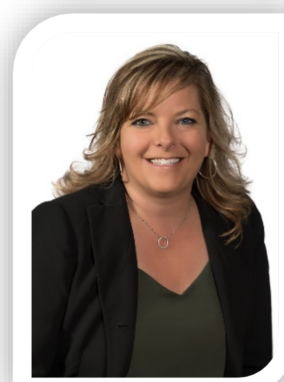
1. Maria Morales with a lifetime WALA membership
2. Laurie Dey-Canales with the WALA Award of Excellence

I would like to thank our board of directors: Mark Bridgeman, Kathy Pline, Laurie Dey-Canales, Jess Beyer, Bridget Lueck, Pamela Zacharias, Sandy Schmitt, Holly Coyle and Kevin Lawrence for devoting their time and talent to leading this chapter over the past year. It was a pleasure to serve with all of you! As I pass the gavel to Mark Bridgeman, the President for 2018-2019, I wish Mark and the entire board of directors all the best as we embark on this 40th anniversary year. WALA always has, and always will, hold a very special place in my heart and I continue to be a passionate supporter of this fine chapter.

PRESIDENT-ELECT

Kathy J. Pline, Executive Director, Boardman & Clark, LLP

We will never be experts…



All of us have very important and multi-faceted roles within our organizations. And without a doubt, we push ourselves to be the well-rounded trusted advisors of administration. The cold hard truth of it is…we will never be experts. And that is completely realistic.

In becoming the best Administrator you can be, you have to learn to rely on your trusted advisors. That is where our Business Partners play a very important role in our success. For example, Gordon Flesch wouldn't come in and try to take over your role as a Law Firm Administrator because they don't know how to do all you do. The same is true in the vice versa. As an Administrator, you wouldn't know all there is to know about copiers, data housing, latest and greatest technology or the trends in this ever-evolving industry.

The same holds true for banking products and trends, insurance liability updates and products, new marketing techniques, changes in capital investing, new software that enhances security and data protection, office trends, etc. You get the picture. There is never enough time in the day, month or year to keep up on an ever-changing world.

Having our Business Partners gives us the educational tools and connections that allow us to learn through them and entrust them with our needs that keep us all moving toward a brighter and more successful future. The long and short of it is… you will never be an expert! But…you can reach out to those important partners who are experts in their respective fields. And you AND your firm will reap the rewards from our Partners who do know best!

Our Business Partners are the best….reach out to them, entrust them with your business needs, learn from them.

A special Thank you to all our Trusted Business Advisors in 2018:

Gordon Flesch Company, Inc.
Creative Business Interiors
Johnson Insurance
M3 Insurance
ABA Retirement Funds
Affinity Consulting Group
Associated Private Client Services
James Imaging Systems
Complete Office of Wisconsin
DirectNetworks, Inc.
Rippe & Kingston
All-State Legal
Information Technology Professionals
Network Financial Services, Inc.

VP OF EDUCATION
Jessica A. Beyer, DeWitt Ross & Stevens, Waukesha

WALA is crafting some awesomeness for the new board term. And the timing couldn't be more perfect. We are celebrating 40 years of servant leadership in the legal community! There's no better way to celebrate this monumental anniversary than with leadership tools for coming generations. With that thought in mind, I'm proud to introduce you to WALA's Next Generation Leadership Program.

WALA's Next Generation Leadership Program is an effort to enhance the development of young management professionals in the legal industry. The program is seeking young professional participants to help WALA advance educational and networking outlets that will help young professionals maximize their WALA membership in addition to increasing diversity, competence, and professionalism in legal management.

Are you interested in participating? Please email Jess Beyer.

In your email please include the following information:

1. What is lacking from the educational/networking aspects of the legal professional industry with regards to administration in all forms for young professionals?
2. What do you offer the industry that you would like to share with other legal professionals?
3. What are you looking to get out of your membership with WALA and your career?
4. How can WALA help the Next Generation Leaders' voices be heard?

Help WALA continue to be the ultimate resource for legal professionals now and into the future. Happy 40th Anniversary WALA!

LOOKING BACK OVER 40 YEARS OF WALA

Robert "Bob" Miller, CLM (2007-08): ALA Annual Conference

One of my many wonderful memories of being a member of WALA was attending the annual ALA Educational Conferences. These conferences provided opportunities for education, networking and social interaction with members and vendors. One important part of the conferences was the presentation of the Awards of Excellence to Chapters. WALA was given many of these awards along with numerous honorable mentions. The awards were the culmination of many hours of effort involving many WALA members.

The effort began with the development of worthwhile programs involving many of our members and outside sources. After the successful implementation and completion of the programs, Chapter leadership selected the key programs to submit to ALA for review in connection with determining which of the Chapter programs warranted recognition. Completion of the award submissions were given to the Chapter members that been instrumental in developing the successful programs. After the submissions had been drafted they were reviewed by other members to be sure they met the ALA guidelines and were submitted to ALA for review.

When the awards were to be presented at Conference, the Chapters lined up outside the ballroom doors to try to get good tables for the presentation. We were usually successful in getting a table close to the front which was good because we had many trips up to the stage to accept various awards. We then celebrated our awards with great pride as we were usually one of the top award winners.

The process of developing and providing programs for our members, working on the award submissions and then celebrating our success was a hallmark of the success of our chapter. Many members accepting responsibility and working together for a common cause.

Cecelia Vanderlip (1997-98): Memories of Early WALA, Pioneers of Change

The late 1980's were a turning point for the Wisconsin Association of Legal Administrators (WALA) regarding technology and State Bar Relations. WALA strived to be a leader in legal management education, not only to our members, but also to the Association of Legal Administrators (ALA) membership across the country. As a new member to WALA in 1989, I was encouraged to get involved right away and began to hold various board positions with two years. That was a blessing to my growth as a leader in my firm and in this association.

I was fortunate to work with a board of talented and eager-to-learn fellow administrators. Our goal was to grow within our association and our firms by educating one another on the various challenges law firms experience. We needed to hear what problems others were dealing with and how they solved them. The majority of our membership worked with small and mid-sized firms. The administrator (office manager) wore many management hats, including human resources, technology, marketing, finances, facilities and general office administration. We didn't have mentors. We were expected to know all the answers. We needed expertise.....and fast. WALA provided the knowledge base and resources we needed for success. Monthly meetings were a beehive of networking, in addition to the formal educational presentation. But we needed more. We needed information at our fingertips and available around the clock.

Technology was just on the cusp in the 1980's. It was difficult to keep up with the fast-paced changes to technology while keeping our offices running efficiently. The internet was fast becoming the "new" wave for obtaining information. Many legal administrators were starting to build websites for marketing their firms. WALA leadership was on the move and I'm proud to say that WALA was one of the first ALA chapters to develop a website. A website....something expected and taken for granted today.

I had the pleasure of working with a dedicated team to plan the design, create worthwhile content, secure domain name, get ALA approval and figure out how to launch the site. After many, many hours of thought, research, and some clumsy approaches, we were finally ready to go. I remember being excited and nervous at a fall workshop with ALA Member Services Director Jan Waugh present, to release this new website via CD disk. What....no streaming??? It was a success! The website was officially up and running. This new vehicle was vital to staying abreast of the ever-changing hardware, software and office/client demands of managing a busy law practice. Having a website helped WALA become more visible in the legal community.

Keeping the website current was extremely important, and an added challenge for already very busy administrators. But somehow, and as usual, WALA leadership came through. Their dedication to assisting others was admirable.

As we grew as an organization, we looked forward for other ways to best utilize the website in solving firm problems. Several WALA members were advisory board members of their local technical colleges. Lori (Kannenberg) Dorn and I both sat on our local technical college advisory boards. As advisory board members, we recommended curriculum for the legal 'secretary' program, shared expectations of what a good law firm employee would be and hosted mock interviews. At the same time technical colleges struggled to get students to obtain legal secretary degrees, many WALA members' law firms were having difficulties finding qualified candidates to fill open legal secretary positions. As we contemplated the problem, lightbulbs were lit! Legal administrators are expected to take innovative and progressive approaches to problem-solving. We thought, "What if we could somehow link a resource to those colleges and potential students within our WALA website?" The wheels started rolling and planning began. With the help of Blackhawk Technical College we formed a committee to ascertain what would be most important on that link. One was getting the word out. How do we reach high school students planning where to go on to further their education and set their careers? WALA had participated in job fairs. We needed to go further. We eventually teamed up with a video company that produced State Bar of Wisconsin video CLE sessions. From that planning came the "Careers in a Law Firm" project, a 'flash animation' tool prospective students could access 24/7 from the comfort of their home or school. This was early 'streaming' in a fun format to appeal to young people. It proved successful in recruiting new students into the legal support staff programs at the technical colleges and eventually into our offices as employees. It was a big deal back then and another way WALA took a leadership role in educating members and the community at large. As a chapter, we submitted an entry for the project at the ALA Annual Conference and won GOLD, the highest award available at that time!

Our visibility continued as an organization within the legal community. Watch for more memories of WALA's 40 years in the summer issue of *Class Action* to read more about WALA and State Bar Relations.

Stephanie Dantinne (2013-14):

Who says you have to be in the same physical location as your teammates in order to be a leader? My experience as a Wisconsin ALA member taught me just that … you don't!

I joined ALA and the Wisconsin Chapter in 2005 as the Office Administrator of Davis & Kuelthau, s.c., in Green Bay. There were no other members in Green Bay and my interaction with the chapter was very minimal.

Steve Wingert urged me to become involved in some capacity and as a result, John Schellinger asked me to assist him with a new website design and platform. I worked with John "long distance" and two short years later joined the board as VP of Communications. It was not always easy attending board meetings. Sometimes the drive would be 2.5 – 3 hours each way and through the 7 years of board commitment, it was well worth the trip in order to elevate our Chapter to the highest standards and provide our members with the highest quality education and information.

The comradery of my fellow administrators and the many people I can truly call my friends was the best part of my journey. It was a joy to work with such a diverse group of individuals, always learning from those with more experience and taking that knowledge and experience back to my firm.

My most cherished memories are the many Spring and Fall Socials, ACE and, of course, attendance at the National Conference. Our Chapter has been one of the strongest ALA Chapters for many, many years and I was very honored to represent our membership as President. It was the gathering of a diverse board of directors and the many, many thought-provoking board meetings that helped me grow as an administrator and individual.

Happy 40th Anniversary WALA and here's to 40 more!

WISCONSIN ASSOCIATION OF LEGAL ADMINISTRATORS
ALA

BREATHING NEW LIFE INTO AGEING RECEIVABLES

Jake Krocheski, Client Connection

Behind most receivables more than 90 days past due is a story about why the account has not been paid – cash flow problems, complicated transactions, and many more. Understand those stories, get to the bottom of them – and you will have a better understanding of how to get paid.

Firms find themselves facing a dilemma. On one hand, they truly want to embrace institutional thinking and run as a business, putting structures and procedures in place and holding people accountable. On the other, they are reluctant to hold the individual attorneys accountable and deprive them of their autonomy because of the different circumstances that impact payment from clients.

It is hard to have clear-cut procedures while poking holes in them with plenty of exceptions. The truth, though, is that your firm must. You need to make it clear to our attorneys and staff – as well as your clients – what your policies and your expectations are. Yet, there needs to be a fair amount of latitude for decisions based on individual client relationships.

To ensure that your receivables are not enjoying a ripe old age, take these steps:

1. Start on the older, harder-to-collect backlog of receivables. It may be necessary to dig deep to understand just how old they are. Many firms do not differentiate between receivables that are 90 days past due and those that are much older. Look to see if there is any recent billing activity on the account, when the last payment was received and for how much. It is surprising how firms continue to do work for clients without considering whether they are paying their bills.
2. When managing the backlog of receivables, look first at your oldest receivables and work your way back to those that are newer.
3. Ask all attorneys to review their clients with outstanding balances and ask them to be truthful. Have them take decisive action: make the collection themselves, get help from the firm's accounts receivable management team or clear the books. The attorneys are best able to assess whether a receivable should be kept on the active list or written off. However, they are often reluctant to follow through with the write-off process. Evaluate each account and determine the likelihood of payment if the firm invests more time and effort to collect. But recognize that when a receivable exceeds 180 days past due, there is only a 50% chance that it will be collected, and the likelihood drops off dramatically after that point. There may be a logical reason why it has not been paid. Perhaps the client does not have the ability to pay. Maybe the attorney has worked out an arrangement with the client whereby he can pay after the matter has been completed. Make sure the responsible attorney communicates what arrangements have been made with each client.
4. Urge firm leadership to be decisive and step in to take action. Management must work through receivable issues and not just take the attorney's word for it. Get your arms around the problem by creating – and empowering – a committee.
5. Evaluate the firm's overall collection efforts. Ask yourselves: Did we do the job right, or did our processes and procedures allow receivables to age far longer than they should have? Review the firm's

policies and procedures concerning receivables that go beyond 90 days. Determine if policies exist only on paper. Implementation is the key. Do you have the right people in place to move the ball forward, and are they empowered to do so? Many firms receive their older receivables with the goal of determining why accounts have not paid and if they have collection problems. Often they learn they have long had problems, but did not detect them earlier in the ageing process.

6. Make the most of staff whose job is to focus exclusively on receivables. Ensure they have the skills and talents that can help attorneys reduce the backlog of receivables. Also, measure the staff's performance to ensure progress is being made and sufficient time is being devoted to working directly with accounts receivable, as opposed to other administrative duties.
7. Write off the account after all efforts have been exhausted. If efforts have been made to collect that do not bear fruit, accept the fact that there is little chance of getting paid and write it off. If the attorney continues to hold up the write-off process, firm leadership needs to step in and get the account written off.

ABOUT THE AUTHOR: Jake Krocheski is President of Client Connection. He has more than 25 years of experience as a management consultant, working with law firms. Client Connection assists law firms of all sizes throughout the United States by furnishing accounts receivable management services and developing practical receivable programs. He can be reached at jakek@clientci.com.

IT TAKES TWO (TYPES OF THINKING)

Paul Purdue, Principal at Attorney Computer Systems

The other night, I was having a conversation with my wife, Barb. She's a retired first grade school teacher. She keeps busy and makes extra cash working part-time in the deli at Cabela's, a popular sporting goods and outdoor retailer.

Barb told me about her day and how they went from slow to super busy. Two busloads of teenagers came into the store – and they all wanted special sandwiches! She described the next hour or so as a whirlwind of breads, vegetables and cold cuts - all coming together as beautiful sandwiches. Meals went out, cash came in, and the customers got what they wanted. It's a small deli, with just my wife and one other employee on duty. The pressure was on - and Barb stepped up. She moved from station to station to making sure all her guest's deli needs were met. When the dust finally settled, and my wife and her coworker caught their breath, the store manager approached them - not the person in charge of the deli, but the General Manager of the store. He came over specifically to compliment Barb. He saw the way she handled the rush - multitasking efficiently and working through the weeds. He concluded his praise with the rhetorical question: "You do everything around here, huh?"

Being the big thinker I am, I couldn't just accept the heart-felt compliment the GM gave my wife. I know he meant it, that wasn't the issue… Moreover, I was curious:

What is it about my wife that makes her able to 'do everything?' How is she able to perform at her best in hectic moments? What makes her do well in times where others would flounder?

I asked Barb if it was part of her job's responsibilities to perform all of the deli functions during a rush? She said no, she hasn't been designated to do these extra jobs. Next, I inquired if this was part of her training. Had they covered with her what to do during a rush? Was this standard operating procedure? Again, she said no, she hasn't been trained to deal with situations like these. She enjoys her job, and her co-workers, so I asked her if she did this extra work in order to be noticed. Did she work more so she'd receive praise like from her superiors? And again, my wife said no. With no speculation left, I just had to ask her outright, "OK, then why do you think you stepped up like that?" Barb thought about it for a few moments. Then, she simply speculated, "I guess it's because I can."

And that straightforward answer showed me the obvious answer I'd been staring at the whole time. When it comes to getting things done and making it happen - Some People Can Just Do That! It's the clutch basketball player that scores the game winning three pointer in the last moments of the game. Or Tom Brady in the 4th quarter. It's the critical thinkers that get their best thinking done right before the final deadline. Some people do their best work in chaos.

The conversation made me think of Mary Jo, and how she's like Barb in some ways. Mary Jo is great at tackling problems we haven't seen before. She is ready to think on her feet and get outside the box. Mary Jo is not afraid to take chances and make mistakes - not if it means finding the best solution. Not me, I'm on the opposite end of the spectrum. I'm a methodical thinker. I ideate infrastructure. I come up with a plan for the future and analyze it from every angle. If you think I can talk, then just imagine the things I'm not saying. In short, I am the planner. After reflecting on these styles of thinking and problem solving, I realized that how you think isn't as important as understanding both approaches. In other words, there is a time and place for both styles of thought.

If there's a new problem at ACS that needs a fast or unorthodox solution, Mary Jo may generate the best idea first. But that doesn't mean she can't appreciate long term thinking or plan a system well in advance I focus in on the long term / big picture and how we can build the right infrastructure to solve a problem. But when push comes to shove, I can think fast and produce solutions. It may not be my specialty, but I can do it.

The lesson here is to learn and appreciate both sides of fence. Learn how to think in either way. It's good to identify what thought pattern resonates with you most. Are you like me - able to create systems, previsualize infrastructure and see the big picture? Or are you more like Barb and Mary Jo - producing answers on the fly and thriving in the most stressful of circumstances?

Figure out your strength. Now, focus in on your weakness. As I've said earlier, it's important you see the value in both ways of thinking. There is a time and a place for both.

How could you improve the way you think and approach a problem?

If you feel like you're already good at planning, then focus on your reactionary thinking. What's a problem that your business recently faced where time was a crucial factor? Or, think about a hypothetical disaster scenario for your company - what's the first thing you would do to solve it?

Do you feel you're better at jumping in on things as they're happening? Then, it's time to exercise your imagination and eye for logistics. Think about a larger problem in your business that immediate action can't solve. Practice activities that stimulate long term thinking and patience.

Again, the most important thing is knowing the time and place for both ways of thinking. You'll figure this out if you understand and recognize the value in the side opposite of yours. By learning from opposite style thinkers, we can enrich our professional and personal lives. Maybe my wife's fast-on-her-feet nature makes her the perfect counterpart to my big planning and dreams. Or maybe it's just because she lets me talk so much.

ABOUT THE AUTHOR: Paul Purdue is a principal at Attorney Computer Systems. He's a self-proclaimed "infrastructure nerd." Check out Paul's growing library of legal technology articles and videos on Attorney Computer Systems' web site.

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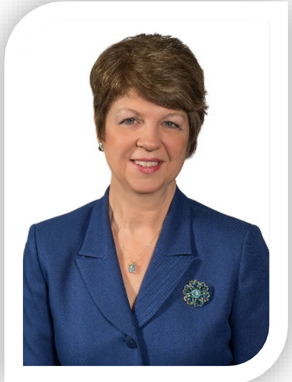
VP OF MEMBERSHIP
Sandy Schmitt, Galanis, Pollack, Jacobs & Johnson, S.C., Milwaukee

Springtime brings new beginnings and renewal of life. The same is true in the Membership area of WALA!



First, thank you for renewing your membership for 2018 and for responding to the membership survey. It is going to be a great year as we "Celebrate 40 Years of WALA Excellence!"Second, I am excited to announce the launching of the student intern/member program. Last year, our organization added a new level of membership aimed at involvement from college students. After several months of planning, coordinating, and soliciting participants, we have two firms who will employ student interns from Marquette University. Special thanks to Jess Beyer of DeWitt Ross & Stevens S.C. and Maribeth Karpinski of Lindner & Marsack and their firms, as well as Galanis, Pollack, Jacobs & Johnson, S.C., for agreeing to mentor these interns. There were several applicants of which six were chosen for interviews. The review committee was truly impressed with the caliber, poise, and confidence these candidates exhibited. If your business can use a talented student intern to assist with a short-term project or special assignment, please e-mail me at sschmitt@gpjlaw.com. The program works as follows: The ALA membership fee is $49. In exchange for 35 hours of work over a six-week period, the member firm or business partner pays this fee as well as an agreed upon hourly rate. The fee to join WALA as a student member is FREE provided the student member joins a committee. This program is a Win/Win as it provides students with networking, work skills, and potential job/internship placement. WALA benefits in attracting and retaining the next generation of workers in the legal industry.

Third, since January, we have three new members whom I am pleased to welcome and highlight as follows:

Julie McDermott is the Accounting Manager at Boardman & Clark, LLP in Madison. She has been with the firm for three years starting as a banking paralegal. After one year, Julie was promoted to her current position. Prior to working at the law firm, she worked in the banking industry on the lending side in private financial services for several years and as a credit analyst.

Best TV series: "This Is Us"
Favorite food type: Mexican
In Spring, I enjoy: Getting out and sitting on my porch with a glass of wine

Christopher Shattuck is the new manager of Practice411 at the State Bar of Wisconsin. He was hired in November, 2017, to head up this program which helps lawyers manage business aspects of their practices, including the use of law office technology to improve efficiencies and deliver better service of clients. Before joining the State Bar, Christopher ran the creditors' rights department at Kohner, Mann & Kailas first as an associate for 3½ years and then as the foreclosure department manager for 2 years.

Last movie seen: "Jumangi: Welcome to the Jungle"
Favorite food type: Italian
In Spring, I enjoy: Being outdoors

Michelle Staniec is the Office Manager for Carlson Dash, LLC. She has been there since December, 2011 and is responsible for all the daily workings of the firm. Her previous experience included working as a litigation paralegal at von Briesen & Roper and also in the area of project management.

Last movie seen: "Coco "
Favorite food type: Mexican
In Spring, I enjoy: Getting outside

Fourth, two of our members have begun new career opportunities. Steve Wingert is the new Chief Operating Officer at Lowndes, Drosdick, Dodger, Kantor & Reed, P.A. in Orlando, FL. Sarah Salisott is Foley & Lardner's new Financial Systems Trainer where she is involved with training at its offices across the United States. Congratulations and continued success to both of you!

Finally, be sure to attend the Spring Social on Wednesday, April 18, 2018. It's a wonderful way to meet new people and renew old friendships. I hope to see you there! New beginnings and renewal indeed!

ACCOUNT-ABLE OR RESPONSE-ABLE?

Judy Hissong, PCC, CLM, Principal of Nesso Strategies

Law firms mostly function in a reactive posture. Heck, most businesses function in a reactive mode of operation. When a law firm does something radical, such as billing by the project, the rest of the industry waits and watches to see what success or failure ensues, and then jumps on board. I'm sure this story is familiar as you likely have been asked more than once to talk with fellow ALA members about how their firms are handling certain issues, and perhaps, what other firms are doing or not doing about the various storms and polar vortexes of 2014?

The difference between being proactive and reactive as a business model is about innovation and the desire to lead. The difference between the ability to account or respond is a similarly challenging one in the legal industry.

• Responsibility — the ability to respond — is inherent. Deadlines drive most of the legal processes, regardless of the area of law you practice. These deadlines flow throughout your organizations with regularity. Multiple people or departments might hold the responsibility of calendaring court dates. Ultimately the American Bar Association holds the attorney accountable when a firm misses a filing deadline.

• Accountability means ownership, and the ability to own (account for) actions and choices. So when I'm responsible for a deadline, and I miss it, do I own the mistake? Or do I push the responsibility to someone or something else, otherwise known as the blame game?

Celebrating 40 Years of WALA Excellence!

2018 MEMBERSHIP CAMPAIGN

WALA is celebrating 40 years as a chapter in 2018, and we want the members to join in on the fun! There will be several opportunities to be part of the many great programs and events WALA offers as well as earn some financial reards – another reason to celebrate!

Here are four key components of WALA that are worth celebrating:

EDUCATION - Always a crowd favorite, the Annual Conference of Education (ACE) returns in 2018! Plan on attending and celebrating this great day of educational sessions and our business partner exposition hall and earn a chance to win a registration scholarship to ALA's 2019 Annual Conference.

NETWORKING - Through the monthly luncheons, social events, ACE, and community outreach events, members celebrate by getting to know new members and reconnecting with each other as well as our business partners. Attend four (4) events on or before the Fall Social for a chance to win two (2) $50 gift cards. Just send an e-mail to Sandy Schmitt listing your four events and your name will be entered into a drawing to be held at WALA's Fall Social.

INVOLVEMENT - Another great way to celebrate your membership is by getting involved. Serving on a committee is a good way to share new ideas and keep our organization going strong. Choose from Business Partners, Communications, Education, Membership, or Special Projects. For each committee you serve on, your name will be entered into a drawing for three (3) $50 gift cards to be awarded at the annual meeting in December. Contact Sandy Schmitt via e-mail and let her know which committee(s) you would like to be a part of, and she will get you in touch with the appropriate Vice President.

FRIENDSHIPS - The friendships and support achieved by members and business partners is also reason to celebrate. The more we have, the merrier! Recruit a new member and earn a $25 gift card. If you recruit a student member, you will earn a $5 Starbucks gift card. For each new business partner you recruit who joins before ACE, you will earn a $100 gift card to be given at the event. Make sure the new Business Partner lists your name in an e-mail to Kathy Pline.

A culture of accountability fosters creativity, innovation and proactive business. These characteristics lead to bottom-line improvement through human performance. So the question is this: How do we create that culture? It's a big question, and the answer is too large to catch with only one hook. Let's make it one we can reel in today. How can you take steps to be more accountable, and hold those you influence accountable?

In the best situations, accountability starts before the performance needs improvement.

My experience is that most people think they are already operating at high levels of accountability. That works until I ask them about a particular situation, and I hear several reasons why x didn't happen. None of those include, "I dropped the ball" or, "I made a mistake." This is a starting point to consider. Where are you skirting accountability? Is it in your ALA volunteer commitments? ("This is not my paying job, so if it's not done on time, it's okay.") Is it in your career? ("I'm going to retire in the next five to 10 years so I don't need to attend education events, pursue a CLM, etc.") Is it in your personal life? ("I don't have time to exercise, clean, cook, etc.") Where you have an excuse for your actions (or lack thereof), you have room for accountability.

What would the above statements sound like with accountability? "I missed the deadline, I won't miss another." "I'm going to retire; I'm choosing to put my energy elsewhere." "I choose to x instead of exercise."

The same is true for our staffs. Where we let poor performance slip by, we foster the decline of accountability. When we confront the behavior, and are met with the blame game, it's our time to shine the light on accountability. We all enjoy stories. We learn about others through their stories. However, when a staff member brings forward yet another story about being tardy, it's time to change the line. Bring out the open-ended questions that develop accountability.

Let's hypothetically consider our newest problem child, Fisher Cutbait. Fisher is once again late for work, the fourth time in 10 days. He's provided you good reasons each time — car breaking down, alarm clock not working, sick child, flat tire — you know them, and you've heard them. You've taken them and reminded him to be on time, and let it go (albeit frustratingly). He is late again today, and you decide to take a different approach. As he rushes in, out of breath and begins today's story, you tell him to settle into his desk and return to your office in 15 minutes.

Already he will know something is different. When he returns, you ask an open-ended question: "What is required for you to be at work on time?" And you wait for his response. If he starts in on the story, you stop him and ask again. If necessary you remind him of the agreement between him and the firm when he receives his paycheck — he has a commitment of time and energy to your organization, and you are concerned about him honoring the commitment. As you continue the questions and conversation, stop him from returning to whatever story he has and continue to build a new agreement about him being on time each day for work. The conversation doesn't stop until you have a plan for him with agreed upon consequences if that plan is not fulfilled. In other words, you may say, "The next time you are late I will write you up. Upon the third write up you will be terminated." Then ask, "What does that say to you? What is our agreement about the next time you are tardy?"

I realize this may sound like harsh dialogue to have with your employee. That's often because accountability isn't currently thriving in your organization. In the best situations, accountability starts before the performance needs improvement. Begin to build accountability by shifting language in the relationships of the firm. Growing awareness to where you are using the word, "I," instead of the word, "You," is a great place to start. And the more this happens at the leadership levels, the easier it is to build into the other levels of your organization.

A culture of accountability fosters creativity, innovation and proactive business. These characteristics lead to bottom-line improvement through human performance. So the question is how do we create that culture?

We've gotten carelessly collective in our language, which gives lots of opportunities to dodge accountability. This is a common misstep in our current culture. Listen to others (and yourself, ideally, although it is more challenging to hear your own language) for places where the collective show up. Here are some examples:

- "We don't do it that way."
- "You know how the military has a stealth bomber..."
- "You make me.”

Now take a look at some accountability statements:

- "I haven't done it this way before."
- "I know the military has a stealth bomber."
- "I am upset. Your choice/action felt hurtful to me."

Consider aligning with a colleague and offer each other feedback when the default becomes the collective. Correct each other; it's as simple as asking, "Who does it that way?" It's a starting point, and small steps lead to big shift.

When talking with someone who is using the collective language, we tend to respond with a defensive posture, especially when the dialogue is about our relationship. And when we talk with the collective, we create defense in the other person.

So when Fisher begins to use the collective, "You know, others come in late,” it's your opportunity to bring him back to first person. Tell him, “This conversation is about you. Please speak about yourself.” Again, this may feel harsh if you haven't established a culture while things are going well.

If you focus on establishing accountability in your relationships — with staff, attorneys, loved ones — you’ll soon see it’s contagious. Your firm will embrace creativity and innovation over time, and your profitability will rise. You’ll also discover that if Fisher doesn’t want to be held accountable, he’ll cut bait and leave.

ABOUT THE AUTHOR: Judy Hissong, PCC, CLM is the Principal of Nesso Strategies, a company built on the passion of exploring how success can be achieved outside the box. Judy is an Accredited Coach and assists firms facilitating strategic meetings, coaching individuals and teams, building and delivering teambuilding playshops, and presenting on a variety of mind/body topics. Readers can join the conversation by participating in her LinkedIn group: Engaging Legal Leaders. Email Hissong or connect to her via Twitter or LinkedIn.

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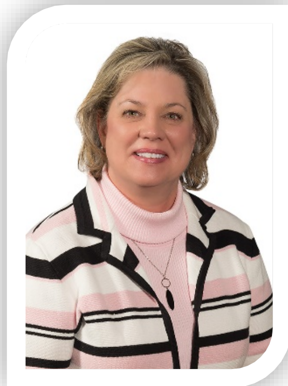


Spring is upon us! Brush off the snow and join us at one of our educational programs. Take a look below for some great opportunities!

Check out the WALA calendar to register and see the latest information on the lunch programs.

CALENDAR OF EVENTS 2018

WALA CALENDAR

Apr		
17	**Milwaukee Monthly Meeting**	Tuesday, April 17, 2018 Roundtable Noon - 1:30 pm Kohn Law Firm 735 North Water Street Milwaukee, Wisconsin
24	**Madison Monthly Meeting**	Tuesday, April 24, 2018 Wisconsin Lawyers Assistance Program (WisLAP) Noon - 1:30 pm Stafford Rosenbaum LLP 222 W. Washington Avenue Madison, Wisconsin

May		
3-6	**ALA Annual Conference & Exposition**	Thursday, May 3 - Sunday, May 6, 2018 Gaylord National Resort & Convention Center National Harbor, Maryland
9	**Madison/Milwaukee Monthly Meeting**	Wednesday, May 9, 2018 Positive Team Development and Team Building Noon - 1:30 pm Joint Session/Video Conference Madison/Milwaukee offices of Quarles & Brady LLP

June		
12	**Madison Monthly Meeting**	Tuesday, June 12, 2018 Collaborating Among Generations Noon - 1:30 pm Murphy Desmond s.c. 33 East Main Street Madison, Wisconsin
19	**Milwaukee Monthly Meeting**	Tuesday, June 19, 2018 Roundtable Noon - 1:30 pm Halling & Cayo 320 E. Buffalo Street, Ste. 700 Milwaukee, Wisconsin

July		
11	**Madison Monthly Meeting**	Wednesday, July 11, 2018 Workplace Violence, Active Shooter Awareness Noon - 1:30 pm Boardman & Clark LLP 1 S. Pinckney Street Madison, Wisconsin
11	**Milwaukee Monthly Meeting**	Wednesday, July 11, 2018 How to get lawyers to say, "YES!" Noon - 1:30 pm Mason Street Grill (Pfister Hotel) 425 E. Wisconsin Avenue Milwaukee, Wisconsin

APR. 11 **Deadline** to submit CLI presentation proposals

APR. 12 **ALA Webinar**: Impacting Financial Performance: KPIs

APR. 16 **Deadline** to enter the 60 Seconds of Fame! video contest

MAY 1–2 **Legal Lean Sigma**® and Project Management Yellow Belt Preconference Workshop

MAY 3–6 **Annual Conference & Expo**, National Harbor, Maryland

Register now for these upcoming events!

ALA also provides legal business professionals with the best industry education available. Many programs are available including conferences, live webinars, on-demand webinars, online courses, podcasts, and conference recordings. Check out this link for additional information.

eLearning Registration Open

Further your human resources or financial management knowledge through ALA's eLearning courses. Learn more about how it can work for you.

Webinars: There are *40* webinars scheduled for 2018; many are adapted from highly rated live sessions presented by our members' favorite conference speakers. Registration opens December 1, and special bundle pricing will be available.

Finance eLearning: Registration for the Finance courses open later in 2018. FM1A: Law Firm Accounting commences May 14, while FM2A: Financial Information & Analysis starts July 16. The dates for FM1B and FM2B are to be announced. Passing the courses and an exam earns you the Legal Management Finance Specialist Certificate.

Alternatively, the 2018 Annual Conference & Expo will offer a live FM1 track. Attendees can go to a series of in-person education sessions that qualify as the equivalent to the online FM1 course.

Become a Certified Legal Manager!

Earning a Certified Legal Manager (CLM) ® designation allows you to demonstrate that you possess the knowledge, skills and abilities needed to operate at a high level of expertise in the legal management field. It means you've met certain experience and employment requirements, received education in various legal management competencies and passed the CLM exam.

Do you want to become a workplace leader? Do you want to certify your mastery of law firm operations, financial management, human resources and business management? Here are some handy details for potential exam takers:

- **Exam dates:** September 5 is the application deadline for the November 5 exam. Mark your calendars!
- **Required education:** Before applying for the CLM exam, you must complete the required coursework. Although you're welcome to cherry-pick from ALA's vast selection of webinars, e-learning and live education, there are two ways to make getting these credits easier — purchase the CLM webinar bundle at a substantially reduced cost, or attend the live education sessions in the CLM Application Track at the 2018 Annual Conference & Expo.

NEW! study guide: This week, ALA will publish the new *Study Guide for the CLM Exam*. It's available in a PDF format, so prospective CLMs can view it digitally or print sections as needed. (If you have previously taken the CLM exam but didn't pass, you can take advantage of 50 percent off the *Study Guide* for your next attempt. Just contact *certification@alanet.org*.)

THE LAST WORD
VP OF COMMUNICATIONS/CLASS ACTION EDITOR
By: Pamela Zacharias, Meissner Tierney Fisher & Nichols S.C., Milwaukee

Well, here we are … Spring of 2018 (nodding my head in disbelief)…and 40 years of leadership for Law Firm Administrators in Wisconsin. With all the hopes and promises that Spring brings and WALA celebrating 40 years of service this is a very exciting time!

We are reaching way back to help us celebrate and move forward. This year promises to remind us of all that we have accomplished together, all we have learned from each other and how far we have gotten because of one another.

You have seen a return of the old WALA logo and read a couple of great articles from our valuable past presidents. Looking back and celebrating all our accomplishments is breathing new life into WALA and positioning us for continued success into the future.

WALA has changed in many ways over the past 40 years, but it has also remained a stable, constant resource for law firm administrator types in Wisconsin. I love to see the emails to members@wi-alamembers.org … they mean that we still value each other's input, we still rely on other's experiences and that we still want to help.

There is so much is going on. We, WALA Board and Committee members, are developing a new website to make it easier for our members to connect and find what they are looking for. We, WALA Board and

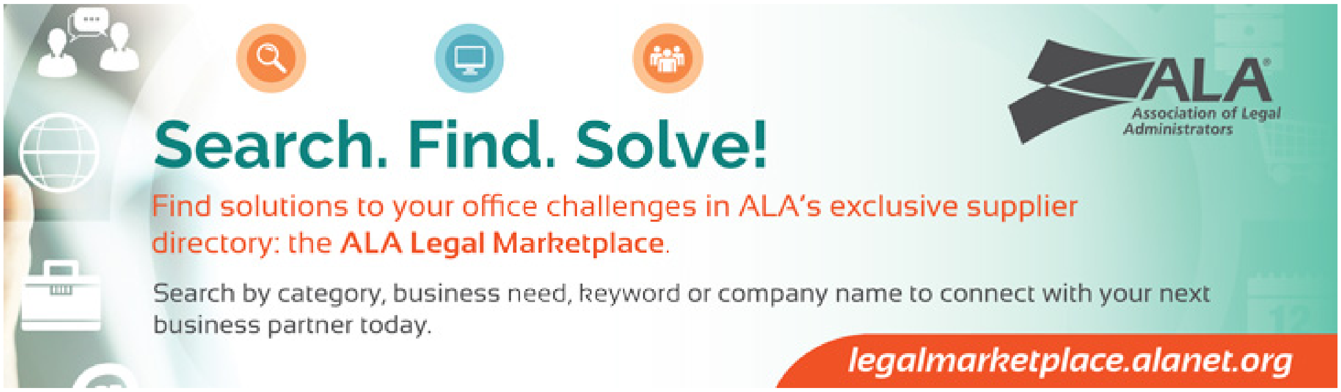
Committee members, are redesigning the WALA logo to best represent all that we can be. We, WALA Board and Committee members, are planning ways to keep the celebration of our 40 years of excellence going all year long. We, WALA Board and Committee members, are planning this year’s socials and educational events, as well bringing back the managing partner event. That is a whole lot of planning my friends! Are YOU part of the we … part of the excitement … part of the future of YOUR WALA? If not, now is the perfect time to get involved!

Be part of the “WE”… reach out to any member of the Board and let them know how YOU want to get involved … be part of the “WE”!

ALA QUICK LINKS

As a member of The Association of Legal Administrators (ALA), there is a wealth of information on the website.

- Locate a Business Partner in the Legal Marketplace or explore the Business Partner Center.
- Learn about the Diversity Initiative.
- Attain the Certified Legal Manager (CLM) distinction.
- Search for educational materials, Conference information, webinar information or purchase materials from the Bookstore on the Education webpage.
- Stay abreast by reviewing the Antitrust Guidelines.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ALA Annual CONFERENCE & EXPO
Navigate Our Future Together
GAYLORD NATIONAL RESORT & CONVENTION CENTER
MAY 3–6, 2018 | National Harbor, Maryland
ALA Association of Legal Administrators
Join Us!
The Annual Conference & Expo in National Harbor, Maryland, is shaping up to be a celebration of diversity and an opportunity to overcome our challenges and navigate our future.
#ALAConf18
REGISTER TODAY
alanet.org/conf18

ALA CAREER CENTER

A variety of articles & resources to help you develop your skills and enhance your career.

- Compensation and Benefits Survey
- Career Resources Kit
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- Free resources from Robert Half Legal®

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