

legal management

THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS



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Professional Development:
A Win-Win for Firms, Their Staff
– and Your Bottom Line

KPIs: The Keys to Tracking Profitability



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PUBLISHER

Eryn Carter, CAE
ecarter@alanet.org

DIRECTOR, MARKETING AND COMMUNICATIONS

Theresa Wojtalewicz
twojtalewicz@alanet.org

MULTIMEDIA CONTENT COORDINATOR

Justin Askenazy
jaskenazy@alanet.org

ADVERTISING OPPORTUNITIES

Fred Ullman
fullman@alanet.org

USER INTERFACE WEB DEVELOPER

Bert R. Saper
bsaper@alanet.org

GRAPHIC DESIGNER

Andrea Fitzpatrick
afitzpatrick@alanet.org

DEPARTMENTS

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Love and Leadership: My Journey with ALA

ALA President Amanda Koplos, CLM, CPA, shares a Valentine's Day message to the Association and its members.

BY AMANDA R. KOPLOS, CLM, CPA



“
Loving ALA means recognizing the power of community. This Association isn't just about networking or professional development — it's about fostering a space where we lift each other up, both personally and professionally.”

February is the month of love, a time when we celebrate the relationships that bring meaning to our lives. Love, in all its forms, connects us, inspires us and strengthens us. For me, love is deeply intertwined with my journey in the Association of Legal Administrators — both personally and professionally.

On February 8, 2008, my life changed in a way I never could have anticipated. While planning the 2008 Region 4 and Region 6 Conference, I had an unexpected encounter. At the time, I was living in Austin, Texas, serving on the local chapter board, and had only been a part of ALA for three years. As the local chapter liaison to the planning team, I was eager to showcase Austin and make the most of the opportunity. The planning meetings were intense, but ALA members always find time for camaraderie. That first night, after a lively visit to a piano bar—because, let's be honest, our members do love their piano bars — I decided to have one last drink at the hotel bar before calling it a night. That's where I met Nick.

Nick wasn't part of ALA. He was simply a guy who had parked in the hotel's garage while enjoying a night out in downtown Austin. But when I saw him,

something told me this was someone worth talking to. A conversation turned into a connection, and that connection turned into a life together. We went on our first date six days later, on Valentine's Day (I know, who goes on their first date on Valentine's Day?), and from there, everything fell into place. We built a life together, got married and had two beautiful children. And while my love for Nick grew, so too did involvement with (and dare I say love?) for ALA.

ALA has been woven into every significant moment of my adult life. When I found out I was pregnant, I wasn't quite ready to share the news, but the Region 4 2009 Conference in San Antonio had other plans for me. During a small, intimate dinner with two business partners and ALA Past President James Cornell, a large bottle of expensive wine was delivered to our table. I quietly passed on the wine in favor of water, hoping to avoid suspicion. But as the evening progressed, I also turned down soft cheeses and prime rib, and, just as my luck would have it, was suddenly struck with my first bout of morning sickness. When I returned to the table, the looks on their faces said it all: "You're pregnant, aren't you?" And just like that, my ALA colleagues knew before my own family did.

My husband often jokes that he married into ALA. And in a way, he's right. Our life together has been shaped by my involvement with this incredible Association. When we got married, we each invited 25 guests. Of my 25, a significant portion were ALA friends and their spouses. One-third of the people I chose to witness one of the most important moments of my life were individuals I met through ALA. They weren't just colleagues or professional acquaintances — they were family.

When my second child was born, the timing couldn't have been more difficult. Just six weeks earlier, I had lost my mother. It was a time of profound grief and overwhelming responsibility. And yet, it was my ALA family that lifted me up. They planned my mother's funeral, cleaned my house and sat by my side after a difficult delivery. Their support was unwavering, and while it may sound dramatic to say they saved my life, they certainly saved me during that chapter of my life.

I know my story isn't unique. Time and time again, I've heard others say they love ALA. But what does it truly mean to love a professional association? What does it mean to love the people who connect us to it? Love, in this context, means more than appreciation — it means commitment, belonging and shared purpose.

Loving ALA means embracing the connections we form within it. We find colleagues who become lifelong friends, mentors who shape our careers and peers who support us in ways we never expected. It means investing in our own growth and the growth of those around us. ALA has been responsible for almost all my professional development, and I know many members feel the same.

Loving ALA means recognizing the power of community. This Association isn't just about networking or professional development — it's about fostering a space where we lift each other up, both personally and professionally. It's about knowing that when life throws challenges our way, we have a support system ready to stand beside us.

As I approach my 20-year anniversary with ALA in March 2025, I find myself reflecting on this incredible journey. Serving as ALA's President during this milestone year is an honor beyond words. My membership has evolved over the years, just as I have. From a new member in Austin to a leader at the international level, my path has been shaped by the relationships I've built, the lessons I've learned and the unwavering love I have for this Association.


So, during this Valentine's Day week, I encourage you to take a moment to reflect on what ALA means to you. Whether it's the friendships, the opportunities or the support you've received, know that you are part of something truly special. This Association is more than just an organization — it's a community built on passion, dedication and, yes, love.

Happy Valentine's Day to all my fellow legal administrators. May we continue to support, uplift and celebrate one another, today and always.

ABOUT THE AUTHOR



Amanda R. Koplos, CLM, CPA is the 2024–2025 ALA President and Chief Operating Officer at Shuffield Lowman & Wilson, PA.

 akoplos@shuffieldlowman.com

 [linkedin.com/in/amandakoplos](https://www.linkedin.com/in/amandakoplos)

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The Evolution of Law Firm User Support

Integrating AI into your legal support tools can be key to making your customer service top-notch.

BY STEVEN BADAL AND JOHN RAMUS



“By maintaining a balance between AI-driven efficiency and the irreplaceable human touch, firms can ensure high client satisfaction and loyalty.”

Technology has transformed the way law firms operate, including their support services. While some firms still rely on traditional human-only support, others are exploring self-service options powered by artificial intelligence (AI).

How do you know which level of support is right for your firm? This article will outline what different users are looking for and help law firms make the right decision on what support to implement for the best possible service and user experience.

SUCCESS FACTORS

The support landscape of the future is being redefined, with success factors now focusing on efficiency, accessibility and innovation, all while applying data-driven insights to make more informed decisions and strategies.

To address these needs, law firms must balance efficient AI-driven solutions with personalized, high-touch service. This balance depends on understanding

client behaviors and preferences. While some users will prefer an actual person they can reach out to when they have a question or need support, others may prefer to have access to a chatbot or a Q&A where they can find the answers themselves.

In some instances — and depending on the users being supported — a hybrid model that offers both self-service tools and readily available personal support can serve diverse client bases best. This approach allows clients who prefer autonomy to use self-service options while those who need it still get comprehensive support. But how do you know which is the best solution for your firm? To help make this decision, let's look at the options:



The Human Touch: Clients accustomed to round-the-clock human support may find it frustrating to rely on self-service options.



Artificial Intelligence: AI-powered tools like chatbots and self-service portals can offer quick answers to routine inquiries, freeing up human agents for more complex tasks.

So what are firms to do?

Different clients may prefer different levels of interaction. Some may gravitate toward quick, automated solutions, while those accustomed to white-glove service or with complex legal needs may value direct conversations and bespoke advice. Ensuring that customer service can adapt to these varying preferences is crucial.

THE ROLE OF AI IN LEGAL SUPPORT

AI is a great option when it comes to handling routine inquiries such as password resets, document access issues and basic procedural questions, allowing help desk staff to focus on more complex client needs. It's also important to remember that despite the advantages of AI, human interaction is necessary whenever integrating AI into any organization to ensure correct usage and accuracy.

Users that want quick, self-service and automated solutions will prefer to use AI support. However, others may still look for person-to-person interactions. Ensuring that customer support can adapt to these varying preferences is crucial.



IMPLEMENTING THE RIGHT SUPPORT

Making a decision on the type of support your firm needs is crucial to meeting all expectations effectively, and selecting the right partner to implement that service is important. Consider the following criteria when evaluating partners.

Expertise and Experience

You will want a partner with a proven track record in the legal industry. This guarantees it understands the unique challenges and requirements of legal services. An experienced partner will be familiar with common legal workflows and the specific needs of law firm clients, enabling it to tailor AI solutions that are both effective and compliant with industry standards.

Scalability and Flexibility

AI solutions must be scalable to accommodate firm growth and flexible enough to adapt to changing legal landscapes. A technology partner offering scalable solutions can help a law firm expand its AI capabilities as its client base grows and its needs evolve. Flexibility in customization is crucial, allowing the technology to adapt to the firm's specific processes and client service strategies.

Support and Training

Comprehensive support and training are vital for ensuring that the staff of a law firm can use new AI tools effectively. A good technology partner will offer ongoing support and detailed training sessions so that employees can maximize the benefits of AI tools. This support extends to troubleshooting and regular updates that improve functionality and security.

Integration Capabilities

The ability to integrate with existing systems is essential for a smooth transition to new AI technologies. A technology partner with strong integration capabilities will make certain that new tools work seamlessly with a firm's current infrastructure, minimizing disruption and enhancing user adoption.

Security and Compliance

Given the sensitive nature of legal data, the importance of security and compliance cannot be overstated. The right technology partner must adhere to stringent security standards and stay current with compliance requirements in the legal sector. This protects the firm and its clients from data breaches and confirms that client information is handled securely.

Asking the right questions will ensure the partner you choose is a fit for your firm.

THE FUTURE OF CUSTOMER SERVICE

As AI continues to evolve, we can expect even more sophisticated tools and deeper integration with human support. However, the human element will remain crucial in providing exceptional client service.

Law firms are in a unique position to benefit from AI in enhancing their customer service offerings. Understanding the specific needs and preferences of their client base is vital to successfully integrating these technologies. By maintaining a balance between AI-driven efficiency and the irreplaceable human touch, firms can ensure high client satisfaction and loyalty.

Evaluating current customer service strategies and exploring AI options will prepare your firm for the demands of tomorrow's legal landscape.

ABOUT THE AUTHORS



Steven Badal is an Account Director, Client Services, for K2 Services.



John Ramus is an Account Manager, Client Services, for K2 Services.



k2services.com



linkedin.com/company/k2services

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2 Ways Small and Midsize Law Firms Can Win More Pitches (and Improve Realization Rates)

Smaller law firms can significantly increase their chances of competing with larger firms by maximizing their digital footprint and building processes and systems around the pitch/proposal process.

BY MIKE MELLOR



“**To improve your pitch win rate (and win more awards), law firms must build efficient and effective processes around crafting drafts, leveraging design, and integrating analyst and reporting information.**”

At many small and midsize firms, it seems that there is a constant “reinvention of the wheel” nearly every time that a pitch or RFP comes through the door. This not only wastes money and time but also can increase staff turnover.

Smaller law firms can significantly increase their chances of competing with large “Goliaths” by maximizing their digital footprint and building processes and systems around the pitch/proposal process.

OPTIMIZE YOUR DIGITAL FOOTPRINT

According to a recent Gartner study, legal and other B2B buyers are roughly 57% of the way through the selection process before they pick up the phone to contact a potential partner. After getting three to four recommendations from colleagues in their network, prospective buyers will typically Google the attorneys to see if the listed bio/industry/practice qualifications match what they are seeking. (Trust me, nobody is going to call an attorney or firm to ask if they happen to have depth in an industry that they didn't see on the website. In other words, if it's not on your biography or practice page, it didn't happen.)

It's also critical to use data to understand where you are losing buyers in the awareness journey, whether via Google Analytics' website bounce rate, gauging client alert reads and forwards and A/B testing emails, or honing the live/in-person messaging that doesn't resonate.

Likewise, encourage attorneys not only to speak, but to also write or record thought leadership pieces that can show their personalities. After all, people buy from those they like and trust. Plus, people want to see that you are at the forefront of thinking through their specific problems. There's no better way to lose a prospective client than for them to visit your bio and see that you haven't developed thought leadership in two to five years. Again, if it's not on your webpage, it didn't happen — and you'll be out of the game before you even knew you were in it.

AUDIT THE PITCH AND PROPOSAL PROCESS

The rough math on this one is staggering. If partners (\$800 per hour) are spending three hours on a pitch or submission, and staff (\$143 per hour, based off \$100,000 per year) are spending 10 hours on a pitch or submission, law firms are potentially leaking over \$375,000 annually by recreating the wheel (to say nothing about the lack of customization that occurs with last-minute pitches).

To improve your pitch win rate (and win more awards), law firms must build efficient and effective processes around crafting drafts, leveraging design, integrating analyst and reporting information, etc. This involves building a "go/no-go" strategy that is followed throughout the firm, managing expectations for both big RFPs and quick turn pitches, creating an RFP database for commonly asked questions, building time for customization and research, building an escalation process for "top client" pitches, tracking win/loss rates, rehearsing for oral presentations, and making data-driven decisions to improve future pitches — to name just a few. By soliciting feedback from clients, staff and attorneys, law firms can gain valuable insights into areas that need refinement and steps that can be streamlined. Further, implementing changes based on this feedback can lead to more compelling pitches that resonate with clients and increase the likelihood of success.

In this area, it is mission-critical to centralize all of the firm's experience; properly code it (industry, attorney, client/matter number, jurisdiction, practice, issue, etc.); and write it in a consistent way across the firm. If your firm is still sending "pardon the interruption" emails



every time there is a new business opportunity, you're more likely losing more pitches than you're winning. Another key is to develop an RFP/pitch answer bank of the most commonly asked questions. While this seems intuitive, it's my experience that small and midsize firms are lacking in these low-hanging areas.

This becomes especially important for boutique and smaller firms that are trying to compete upstream with large opportunities, as they will be facing massive marketing teams that have all this data ready at their fingertips. The solutions can be basic to start and build proof of concept for investment (i.e., even in Excel), but ultimately tying these descriptions to the financials can help in attorney resourcing and pricing and will facilitate the gap analysis necessary to find cross-selling opportunities while also helping teams to audit and develop missing descriptions on attorney bios and practice pages.

The key is streamlining these processes so you can win more today, tomorrow and the next day — and so your firm won't continue to increase reputational risk and lose business.



Hear More About Process Optimization with *Legal Management Talk*

Mike Mellor recently joined *Legal Management Talk* to discuss how firms can improve their information-gathering processes to help attorneys communicate better and win more pitches. Tune in today: alanet.org/podcast

ABOUT THE AUTHOR



Mike Mellor is the President and Founder of 742advisors, where he helps build systems and processes that help firms to earn new business. A former Chief Marketing Officer at an AmLaw 200 firm, Mellor brings over 20 years in helping law firms, Big Four firms, and financial services firms to win more with fewer resources.



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Implementing Effective Mentorship Programs for Underrepresented Lawyers

Here's how to set up a program that gets the best out of mentors and mentees.

BY ALEX REVELIN



“
A well-structured
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In today's evolving legal profession, diversity and inclusion are no longer optional objectives but essential components of a successful and forward-thinking firm. However, despite increased awareness and initiatives aimed at promoting diversity, many lawyers from underrepresented backgrounds continue to face significant barriers to career advancement. These barriers – ranging from lack of access to influential networks to unconscious bias – can affect even the most talented professionals.

One highly effective strategy to address this disparity is the implementation of mentorship programs specifically tailored to support underrepresented lawyers. By fostering relationships that offer career guidance, support and networking opportunities, mentorship programs can serve as critical tools in leveling the playing field and ensuring that diverse talent is nurtured and advanced within law firms.

WHY MENTORSHIP MATTERS FOR UNDERREPRESENTED LAWYERS

While mentorship benefits all lawyers, it plays a particularly important role for those from underrepresented backgrounds. These individuals often encounter unique challenges in their professional journeys that their peers may not experience. For instance, a lack of representation in leadership roles can limit the visibility of diverse role models, leaving underrepresented lawyers without clear paths to follow. Additionally, unconscious biases — whether implicit or explicit — can affect opportunities for career progression, while insufficient access to key networks can further exacerbate these challenges.

A well-structured mentorship program provides underrepresented lawyers with invaluable tools to navigate the complexities of the legal profession. It can serve as a bridge to influential networks, facilitate skill development and provide crucial insights into the unwritten rules of firm culture. Beyond these tangible benefits, mentorship also offers emotional and psychological support, helping to boost confidence and resilience in the face of obstacles. This combination of practical guidance and personal encouragement can significantly accelerate career advancement and position underrepresented lawyers for leadership roles.

KEY ELEMENTS OF AN EFFECTIVE MENTORSHIP PROGRAM

To develop a successful mentorship program, law firms must thoughtfully design a framework that addresses the specific needs of underrepresented lawyers while promoting meaningful relationships between mentors and mentees. Several critical components should be considered:

- » **Clearly Defined Goals and Structure:** Establishing clear objectives is essential to the success of any mentorship program. Defining the program's goals — whether they are focused on skill development, leadership training or expanding networks — helps ensure alignment between mentor and mentee. The program structure should also outline expectations around the frequency of meetings and overall duration of the mentoring relationship.
- » **Matching Process:** A thoughtful matching process is key to the success of mentor-mentee relationships. Pairing individuals based on shared professional interests, career goals and personal compatibility increases the likelihood of a productive and fulfilling relationship. Firms should consider involving both mentors and mentees in the selection process to ensure buy-in from both parties.

- » **Training for Mentors:** Mentors, no matter how experienced, can benefit from training to enhance their effectiveness. Providing mentors with tools such as cultural competency training can help them better understand the unique challenges faced by underrepresented lawyers. Additionally, training sessions can offer guidance on how to provide constructive feedback, navigate sensitive topics and maintain a balance between professional and personal support.
- » **Support and Monitoring:** Continuous support is necessary to ensure the success of both mentors and mentees. Regular check-ins, progress reviews and access to resources can help both parties stay on track. These measures also provide opportunities to address any challenges that may arise and ensure that the program remains aligned with its original goals.

STEPS FOR IMPLEMENTING A MENTORSHIP PROGRAM

The implementation of a mentorship program begins with a thorough assessment of the firm's current landscape and the specific needs of your underrepresented lawyers. This assessment should involve gathering input from diverse voices within the firm to identify gaps and areas where mentorship could make the greatest impact.

Support from firm leadership ensures that the program receives the necessary resources and visibility to succeed. Engaging a diverse planning committee to design the program further strengthens its foundation by incorporating varied perspectives into the structure.

Building the framework involves establishing clear expectations around the roles of both mentors and mentees, outlining the logistics of the mentoring relationship, and defining how success will be measured. Recruiting mentors who are not only experienced but also committed to diversity and inclusion is another crucial step. For mentees, the selection process should be transparent and based on factors such as career stage, individual needs and professional goals.

Prelaunch orientation sessions for both mentors and mentees are recommended to ensure that all participants have a clear understanding of the program's objectives and expectations. Once the program is underway, regular check-ins can help ensure that both mentors and mentees are making the most of their relationship.

BEST PRACTICES FOR BUILDING STRONG MENTOR-MENTEE RELATIONSHIPS

The foundation of a successful mentor-mentee relationship is built on mutual respect and open communication. Both parties should agree on the frequency of meetings, preferred communication methods and the specific goals they hope to achieve together. This early alignment helps establish trust and accountability.

Creating a safe space for honest and open discussions is equally important. Underrepresented lawyers may face challenges related to bias, microaggressions or isolation, and having a trusted mentor who can provide guidance and support in navigating these issues is invaluable. Mentors should encourage candid conversations and offer practical advice on how to handle such situations.

Mentorship is a two-way street, and mentors often find that they learn from their mentees as well. Diverse perspectives can offer mentors fresh insights into the challenges and opportunities faced by lawyers from different backgrounds, fostering a deeper understanding of the importance of diversity and inclusion in the profession.

EVALUATING THE SUCCESS OF MENTORSHIP PROGRAMS

To ensure that a mentorship program is achieving its intended impact, regular evaluation is critical. Firms should implement a combination of quantitative and qualitative measures to assess the program's effectiveness. Quantitative metrics, such as career progression, promotion rates and retention of underrepresented lawyers, can provide tangible evidence of the program's impact. Additionally, firms should gather qualitative feedback through surveys, interviews and testimonials to gain a more nuanced understanding of the program's value.

Long-term success can also be measured by examining changes in diversity at various levels of the organization, particularly in leadership roles. As mentorship programs mature, firms should continuously evaluate and refine their strategies to ensure they are meeting the evolving needs of their participants.

ADDRESSING COMMON CHALLENGES

Like any initiative, mentorship programs face challenges. One of the most common obstacles is time constraints. Both mentors and mentees often have demanding schedules, so it's important to set realistic expectations and provide flexibility in how and when meetings take place.

Another challenge is the lack of diversity among potential mentors. In firms where there are few diverse role models at senior levels, cross-cultural mentorship or partnerships with external organizations can provide mentees with the support they need.

Creating a culture that embraces diversity and mentorship requires ongoing education and advocacy from leadership. Firms should emphasize the value of mentorship not only for the mentees but for the organization as a whole, highlighting the benefits of diverse leadership and inclusive workplace cultures.

Implementing mentorship programs that address the specific needs of underrepresented lawyers is a critical step toward building a more inclusive and equitable legal profession. By offering structured support, fostering meaningful relationships and expanding professional networks, these programs can make a lasting impact on the careers of diverse attorneys.

As the legal landscape continues to evolve, mentorship programs must remain dynamic and responsive to the changing needs of diverse professionals. Through continuous evaluation and adaptation, law firms and legal departments can create environments where all lawyers, regardless of their background, have the opportunity to thrive and lead.




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Did you know ALA keeps an updated list of the DEIA content we've published? From articles to podcasts, be sure to visit our DEIA Resource Hub often. alanet.org/deia

ABOUT THE AUTHOR



Alex Revelin is a legal industry professional with over 10 years of experience in law firm management, corporate counsel roles and entrepreneurial ventures. Revelin combines a legal background with expertise in operations management, business development and strategic planning. With a JD and an MBA, Revelin brings business insight to their current role overseeing operations and human resources for Zuber Lawler LLP.

 [linkedin.com/in/alex-revelin-jd-mba-23a1ba47](https://www.linkedin.com/in/alex-revelin-jd-mba-23a1ba47)

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Building a Strong Information Foundation to Unlock AI's Full Potential

Organizing your firm's data (and deciding what's important) will help generative AI become a more effective legal tool.

BY ALEX SMITH



“**GenAI isn't going to be able to determine on its own which data is most useful and which isn't. Human involvement is key, particularly when it comes to filtering the data.**”

Law firms in a rush to adopt generative artificial intelligence (GenAI), beware: Too many firms attempt to use AI as a “silver bullet” for bad information management. The truth is, no technology — not even something as “intelligent” as AI — can magically fix years of bad information management practices.

GenAI thrives on high-quality, well-organized data that's been properly collected, classified and tagged. Law firms that already have this information architecture (IA) are ahead of the curve and well-positioned to get the valuable knowledge-seeking and insights lawyers are expecting AI to deliver.

Firms can certainly use GenAI tools to benefit from summarization, data point extraction, clause extraction, small scale due diligence and so on. However, without proper IA, AI will remain a useful point solution rather than something that delivers on the full promise of institutional knowledge.

For best results with GenAI, law firms should make “IA before AI” their mantra, starting by asking the following questions:



1. Where's the good data?

Sounds basic, but law firms should start by locating their trusted data. Where does the “good stuff” live?

Firms with a document management system (DMS) have a leg up because they already have a single centralized location for their important files, templates, knowledge assets and best practices documents rather than having them scattered in different places.

Additionally, key business functions may be run in spreadsheets stored in the DMS. These should be identified and marked out uniquely as valuable resources.

2. What qualifies as good data?

GenAI isn't going to be able to determine on its own which data is most useful and which isn't. Human involvement is key, particularly when it comes to filtering the data. Speaking of filtering: Giving GenAI access to all files in the DMS will likely overwhelm the underlying large language model (LLM) with too much information.

It's far better to provide a subset of data, like final approved versions of documents, rather than each and every draft that led up to that final product. Limiting content to more recent data is also a good idea due to the constant evolution of laws and regulations, which can make older documents out-of-date or no longer applicable.

3. How accessible is the data?

Depending on the firm's security model, some data may be restricted, leading to inconsistent AI responses based on who within the firm is asking GenAI a question and what kind of access levels or permissions that person has.

Adopting a more open security posture for items like best practices and knowledge assets ensures uniform AI responses while balancing security with accessibility. Be sure, however, to treat sensitive business data like billing, salary and employee information with the same confidentiality as client data, only using abstracted data as needed for AI.

4. How can process support the data?

While humans and technology play crucial roles in strengthening the firm's IA, there also needs to be a change in processes.

Workflow automation can be particularly useful here. Think about the valuable data in a typical set of closing books. Processes can ensure that documents in that closing set are saved in a specified location in the DMS, preventing them from being misfiled or not filed at all because legal professionals are stretched thin and have too many to-do items on any given day.

Similar process automation can ensure that important email attachments don't disappear when they're filed into the DMS — the actual documents in the attachments will be properly saved and filed so that GenAI can access them.

It's best to keep the processes around keeping data flowing in the right direction simple so that people will actually be a part of the solution when it comes to building up and maintaining the information architecture. A great user experience for any supporting technologies is key here so that people can easily get valuable data to the right location, rather than finding workarounds that might just leave the data improperly filed or otherwise stranded so that it can't be leveraged by GenAI.

THE FOUNDATION MATTERS: DON'T IGNORE IA

Information architecture is just like real-world infrastructure. It's the critical foundational layer that needs to be put in place before you can build on top of it. And if the foundation is shaky, it doesn't matter what type of house you build — you're going to run into problems sooner or later.

By prioritizing a solid IA framework, firms enhance their technological foundation and ability to leverage GenAI to its fullest extent, paving the way for better business results moving forward.

ABOUT THE AUTHOR



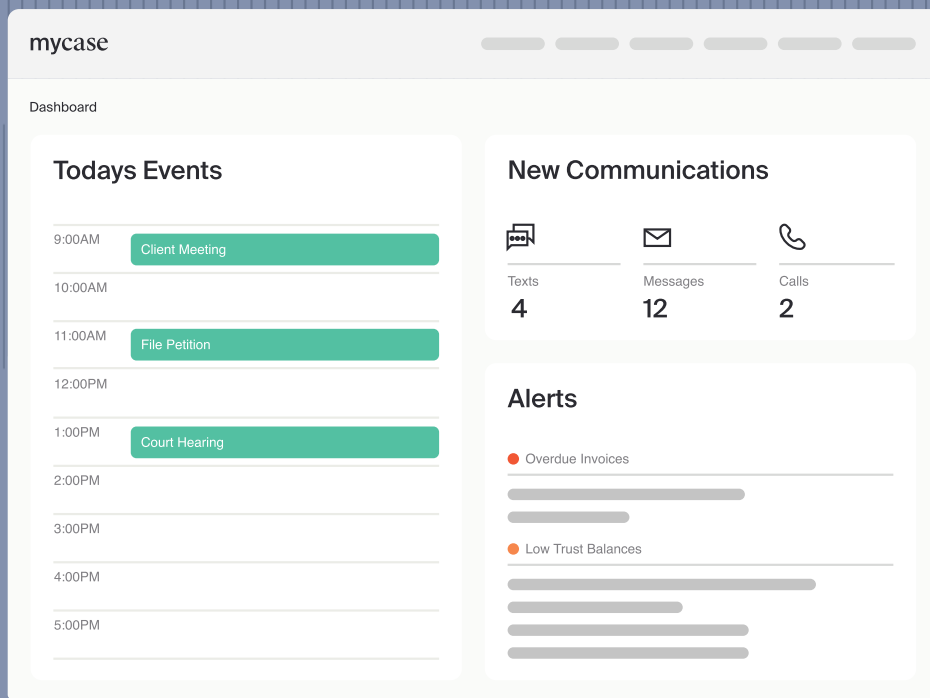
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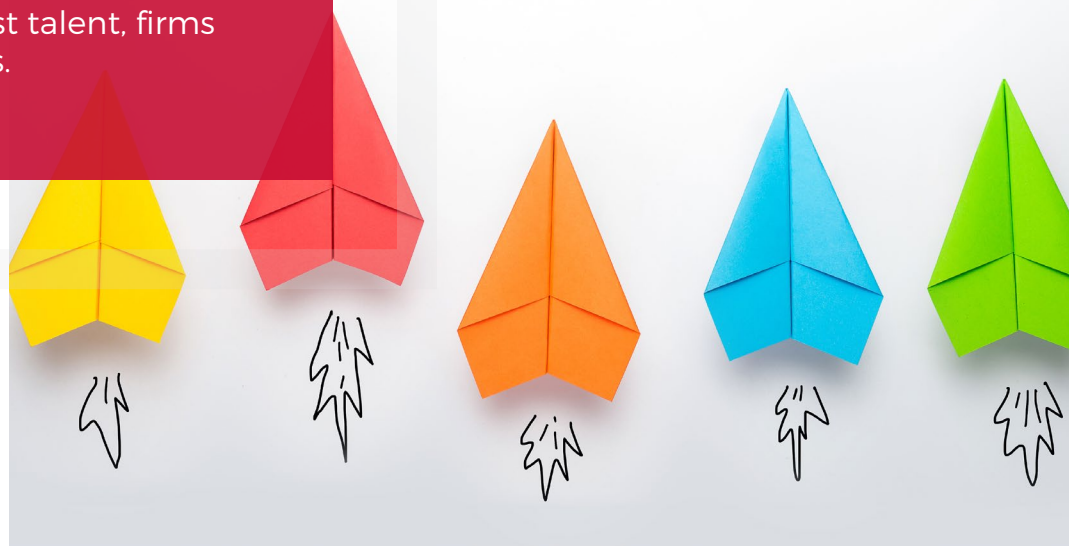
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Tips for Staying Competitive in a Client-Driven Market

To maintain profitable growth while continuing to attract the best talent, firms must evaluate their offerings.

BY JACOB MORVAY



“Partner compensation models based on billable hours and yearly earnings distribution, neither support the long-term investments required for significant technological advancements, nor the opportunity to “invest” in new practice areas that would create short term losses for the potential of long-term gains.”

Today’s landscape for delivering legal services is rapidly changing. Clients have clearer expectations on costs of services, firms are racing to combine and control market share, and the technology and people investments necessary to remain competitive continue to grow. This changing environment necessitates that law firms reassess multiple traditional practices, including traditional pricing (i.e., the billable hour) and historical views toward treating engagements as projects to be proactively managed.

Historically, attorneys and other timekeepers bill clients hourly for legal services. Overhead costs — primarily real estate and support staff — were recovered as a small component of the hourly rate. However, the need to incorporate both advanced technology — and more importantly, the people who can best utilize that technology — has introduced new costs that cannot be directly billed. As a result, firms must rethink how they price their services — or if they can continue to offer the same services.

The approach of incorporating overhead into the billable hour is becoming increasingly untenable, especially when clients do not directly perceive the

value of these additional costs. Moreover, technological advancements and evolving client expectations are driving greater efficiency. This efficiency reduces billable hours and consequently, revenue generated under the traditional model. The rapid expansion of e-billing has given clients immense data sets to evaluate firms against each other. Clients are able to determine their own benchmarks for cost, time of delivery, rates and leverage — and are holding firms to those benchmarks.

Clients know it will take less time and more junior staff to complete tasks and are using that information to make business decisions. According to Dolapo Olushola-Uwaifo, Director, Legal Process Engineering at Baker Donelson, “The more clients know there are other firms that are faster and cheaper, the more work [firms who are] resistant [to change] will lose.” This is why moving a firm’s existing portfolio of work to a fixed or alternative-fee model is not enough. Law firms must do more than merely adjust their pricing strategies; they need to reevaluate their service offerings entirely.

STAYING PROFITABLE

To maintain profitable growth while continuing to attract the best talent, firms must evaluate their offerings to determine which services can be provided through a competitive and intentional pricing program. This may mean divesting from practices where this is not feasible, while investing in others that are currently lacking. Firms will need to prioritize their client relationships over their internal personnel to adjust to this new reality. For example, IP prosecution work continues to have declining rates and margin as firms compete on price. Improving leverage to less expensive billable resources is not enough to be competitive in this area. A firm needs significant investment in legal project management personnel and technology to deliver high quality work at competitive prices.

The shift toward alternative pricing necessitates a shifting culture concerning compensation structures. Alex McNally, Legal Project Manager at McCarter & English LLP, notes “cultural acceptance has been difficult because partners closely guard client relationships. [For that to change,] there needs to be an open door for administrative specialists to bridge the gap.”

Opening that door requires the alignment of incentives through the partner compensation model. Concurrently, firms are also selling work that is higher rate/higher margin that requires less technology and more detailed legal analysis. Partner compensation models based on

billable hours and yearly earnings distribution neither support the long-term investments required for significant technological advancements, nor the opportunity to “invest” in new practice areas that would create short term losses for the potential of long-term gains.

Not all practices are created equal. Workers’ compensation practices and merger and acquisition practices have different value propositions to clients. That’s not to say one is better than the other; rather, that clients value them differently. Firms can make as much — if not more — selling commodity work, if they do so with the right organizational and incentive structure.

The structure that supports a profitable practice with more commodity work will necessarily be different than the structure for “bet the company” work. Firms have three decisions:

- » **Pick one:** If the firm does not want to have more than one compensation structure for its partners, they should invest in the practice type that is most suitable for their current partnership and client base and divest in the other. This will allow them to maximize profitability and success in their chosen area.
- » **Stick with both, with some modifications:** Although more difficult, this option allows firms to continue serving clients broadly, without divesting from practices. Law firms will have to accept that some partners and practice areas generate revenue and profit on time, whereas others do so on efficiency. For those in the latter, a new compensation and staffing structure must be developed to allow for the same level of profitability and partner compensation as the former.
- » **Stay the course:** Not making either change prioritizes current culture over long-term business planning. Firms should identify which practices are most valuable to them and be prepared to defend them in the marketplace. The risks here are significant. As McNally says, “staying the course often prioritizes comfort over progress, but failing to evolve can lead to stagnation and lost opportunities, especially when the industry is embracing new ways of working.”

EDUCATING CLIENTS

The impact of these changes varies with firm size. Small firms often have the agility to implement new technologies and innovative pricing models quickly, allowing for swift decision-making and the ability to pivot strategies without the encumbrance of extensive bureaucratic processes. However, they may lack the

capital resources necessary for substantial investments in technology and specialized personnel.

Conversely, large firms typically have access to greater financial resources, enabling them to invest heavily in advanced technologies and expert staff. However, they contend with complex organizational structures that can slow the adoption of new practices. The scale of implementing change across a large firm can be daunting, requiring careful planning and consensus-building among numerous stakeholders.

Implementing these changes also requires firms to educate their clients about the value added through technological investments and alternative service delivery models. Clients asking for fixed fees or other alternatives will not create the opportunity for success. Firms must identify services that can be offered through a portfolio of offerings and use that strategically to sell into the marketplace.

The legal industry's landscape is shifting, and law firms must adapt by rethinking both their pricing strategies

and service offerings. By embracing alternative pricing models, investing in technology, accepting failure and adjusting compensation structures to support innovation, firms can position themselves for sustained competitiveness in the future.

ABOUT THE AUTHOR



Jacob Morvay is a seasoned consultant and the President and Chief Executive Officer of Morvay Consulting Group, bringing over 20 years of expertise in the legal and accounting sectors. With a strong background as a former Chief Financial Officer for AMLaw 100 and 200 firms, he specializes in managing complex transformation initiatives, including organizational change, ERP implementations and billing transformations. Known for his strategic insights and ability to align stakeholders across all levels, Morvay is dedicated to delivering measurable results and driving sustainable growth.

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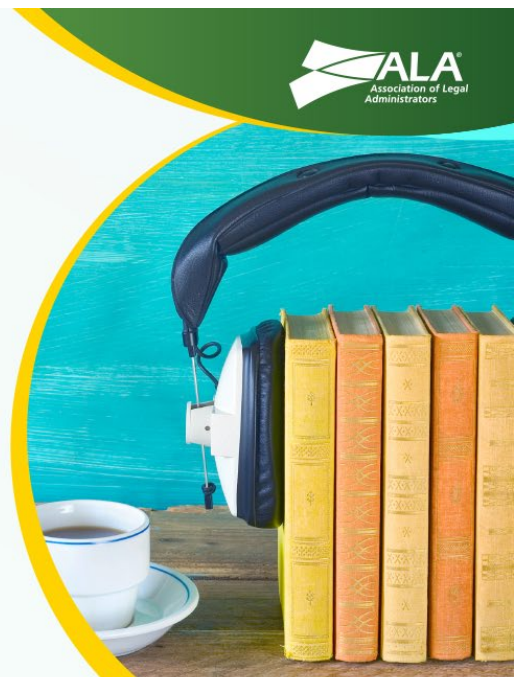
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Crafting a Compensation Structure for the Future

As technology and client needs evolve, firms should be assessing which pay structure positions them to provide the best service going forward.

BY ALEX HESHMATY



“**The optimal compensation strategy is one that brings together the firm’s core values and incentivizes those behaviors that enhance client experience, drive firm growth and positively contribute to firm culture.**”

The optimal method of compensation in law firms is a hotly contested debate, and one that is receiving a lot of attention due to an increasingly competitive market and recent shifts in client billing techniques. Traditional methods of doling out profits to lawyers are changing, meaning firms have had to adjust to meet new expectations.

The most traditional salary structure for lawyers, known as “lockstep,” essentially determines compensation based on seniority and/or years of service within a firm. It typically works according to the concept of the rule of thirds, whereby one third of client fees is set aside for salaries, one third for overheads, and the remaining third for profits shared by equity partners. This method worked well in the past, when lawyers would often work at the same firm their entire lives, gradually progressing from trainee to associate to salaried partner, and eventually equity partner.

But over the last few decades, lockstep has fallen out of favor, with lawyers increasingly progressing their careers through lateral moves between different firms, rather than following a hierarchical path up a single ladder. Instead of

basing take home pay on loyalty, many firms now choose to pay their fee earners according to their ability to generate new fees, a remuneration concept sometimes known as “eat what you kill.” This method can result in large bonuses for a few select rainmakers who manage to attract high value clients but arguably skews the primary purpose of lawyers — providing legal advice — and instead focuses on their business acumen and commercial savvy.

“Traditional performance evaluation metrics and reward systems are based on the wrong ideas,” says Catherine Alman MacDonagh, JD, Chief Executive Officer and Founder of the Legal Lean Sigma Institute. She is also a member of ALA’s Professional Development Advisory Committee. “Most models demonstrate an alarming commitment to inefficiency. If [hours worked] are written off or down or don’t translate into profit for the firm and value for the client, why reward that behavior?”

Eden Niknafs, CLM, SHRM-CP, Partner, Legal Operations at Clear Guidance Partners, agrees that traditional compensation structures are not the most effective: “The old and easiest method, counting billable hours and overall collections, is no longer the best practice for most firms.”

Niknafs says some of the issues with the traditional billable hour include discouraging efficiency, pitting clients and attorneys against each other and promoting competition instead of collaboration. There’s also a client service downside. “Holding billable hours or pure collections as the goal fails to provide KPIs [key performance indicators] and tools that align attorney and staff behavior in a way that promotes client service and whatever else the firm has identified as their mission and how they differentiate themselves from the competition,” she says.

ALTERNATIVE AND EMERGING COMPENSATION STRUCTURES

So if the established compensation structures are falling out of favor, what is replacing them? Rather than abandoning the old methods completely, many firms are mixing them with new concepts and creating hybrid models. For example, the largest firm in the United Kingdom, Clifford Chance, has recently modified its lockstep scheme by introducing a points system that compensates its top performers according to certain performance criteria, while simultaneously recognizing seniority.

MacDonagh says she welcomes the recent innovations. “I think this is the direct result of the increasing

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Firms would do well to elevate and compensate by implementing a system that rewards the behaviors we want to encourage.”

sophistication of the business professionals in which law firms are investing,” she says, adding that an approach centered around data and metrics “is far more likely to produce competitive advantages, particularly with regard to talent/lateral acquisition, development and retention.”

There are, of course, a plethora of ways to measure the performance of a lawyer for purposes of compensation, from billable hours to client satisfaction and business engagement, or even technical ability. A recent survey by LexisNexis found that the top metric used to measure attorney performance is their quality of work.

Regardless of the metric used, it’s important to ensure a firm’s values are reflected in any KPIs and associated compensation policies. “The optimal compensation strategy is one that brings together the firm’s core values and incentivizes those behaviors that enhance client experience, drive firm growth and positively contribute to firm culture,” Niknafs says. She says one way to do that is to create a program that allows attorneys to self-select the relative weight of each of the firm’s important KPIs. “In this strategy, attorneys and partners can choose their relative strengths, whether it is rainmaking, client service, firm promotion through speaking engagements, or a specific expertise, and weigh their compensation so that it supports the value that they bring,” she says.

THE RISE OF THE LEGAL CONSULTANT

Virtual law firms have also grown in popularity over the last few years, with fee earners increasingly drawn to the independence they offer. The attorneys in these firms, sometimes referred to as legal consultants, typically work in a freelance capacity, albeit under the umbrella of the firm, benefiting from legal insurance cover, marketing and back-office support. In terms of compensation, legal consultants generally keep the bulk of their fees and pay a commission to the firm.

Belinda Lester, Managing Director at virtual law firm Lionshead Law, explains that her firm’s compensation model provides lawyers between 70% and 80% of the fees they generate in addition to bonuses based on the

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Current fee structures don't incentivize lawyers to provide more value than an AI tool, meaning the traditional delivery of legal services will soon be out of step with how clients want to consume them.”

amount of work they refer to colleagues or on the number of other lawyers they bring on board. They also require clients to pay up front so the attorney can receive their compensation immediately upon filing their invoice. “This way, we derisk being a consultant and can attract and retain committed experts,” she says.

THE IMPACT OF LEGAL TECHNOLOGY ON BILLING AND COMPENSATION

In addition to client demand, technological advancements are another factor ushering in the displacement of the billable hour with fixed fees. In particular, generative artificial intelligence (GenAI) is heralded as having the capability to dramatically improve the efficiency of fee earners, which ultimately means that the same client matter should theoretically take less time and therefore result in reduced billable hours. Although GenAI providers proclaim this as a net benefit for lawyers and their clients, there is a counterargument that the deployment of this technology simply means that higher volumes of work will need to be undertaken to make the same level of profit – not to mention the often additional cost of licensing fees for the technology itself.

One method of surmounting this challenge for firms may be to levy fixed fees where possible. Indeed, a LexisNexis report suggests that almost 40% of private practice lawyers are considering adjusting their billing practices as a result of AI.

Joanne Brook, a Consultant Lawyer at Lionshead Law, warns that firms will increasingly need to adapt to GenAI to meet client expectations, especially before AI becomes able to provide legal advice and solutions – which some estimates say could be within the next three years. “Instant access advice from [AI tools] is going to fell certain legal services, providing free answers that are ‘good enough’ and possibly even better than advice directly from a lawyer,” Brook says.

Brook adds that current fee structures don't incentivize lawyers to provide more value than an AI tool, meaning the traditional delivery of legal services will soon be out of step with how clients want to consume them. “The legal profession seems to be doing little to confront this risk either in terms of ensuring ‘reserved activities’ fall outside of AI advice or to rethink fees,” she says. She notes that packaged services and all-round retainers that provide significant value and instant access to legal support from real humans must be available if lawyers are to remain relevant and continue to generate revenue in a new AI-centric world.

HOW TO CUSTOMIZE THE COMPENSATION STRUCTURE FOR YOUR FIRM

There is no one-size-fits-all approach to legal sector compensation; each firm needs to consider the optimal structure for its own culture and staff. Although lawyers move around a lot more than they used to, their years of experience should still be properly rewarded, so lockstep isn't going to disappear any time soon. However, other factors that measure the performance or value to the firm of individual fee earners may need to be increasingly balanced against their seniority. And it might be that the virtual law firm eventually becomes the dominant model, leaving the matter of compensation to the individual legal consultants.

However billing structures evolve over the coming years, MacDonagh says client service should remain the guiding principle. “We should use knowledge, wisdom and data to improve and deliver work in ways that create highly satisfied, loyal clients,” she says. “Firms would do well to elevate and compensate by implementing a system that rewards the behaviors we want to encourage.”

ABOUT THE AUTHOR



Alex Heshmaty is a U.K.-based freelance copywriter and journalist, specializing in law and technology. He runs content marketing agency Legal Words, offering blogging and content creation for a wide range of businesses, including law firms and IT companies. Heshmaty has written extensively about the impact of technological developments on both lawyers and their clients.



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Professional Development: A Win-Win for Firms, Their Staff — and Your Bottom Line

In a tough hiring market, having a well-structured professional development program can set your law firm apart.

BY LAURA SEMKO



“When meeting with potential employees on any level, we talk about training programs in great detail. It is something many candidates ask about now, so they are looking for it. It is part of their job search and decision-making process.”

Building a solid professional development program may not rank as a top priority in budget planning and day-to-day operations at many firms. But investing in staff learning and skill-building can be a useful business strategy that helps boost your bottom line.

Additionally, offering ongoing professional development services for attorneys and legal support staff can provide several benefits to firms. Employees who have access to and take advantage of continuing education and career training become more confident, capable and proficient in their job responsibilities. That, in turn, can translate into improved work efficiency and overall client satisfaction, resulting in a positive return on investment.

“Professional development is very important for multiple reasons,” says Sarah E. Cramer, Director of Human Resources at Baker Sterchi Cowden & Rice LLC. She also serves as a Director on ALA’s Board of Directors. “But primarily, when employees get professional development, they are better at their jobs. So professional development is great for employees and also great for the firm.”

Having a well-structured professional development program can also help retain employees and attract new ones. Many firms face challenges in staff retention. Offering regular professional training can show current employees that a firm is serious about their career development. It can also help improve overall job satisfaction. In fact, according to the 2024 LinkedIn Workplace Learning Report, people who received on-the-job learning reported feeling more connected to their company and a stronger sense of purpose in their work.

“In general, people want to learn and grow, and get better,” says Cramer. “Professional development helps us retain employees because they feel that their company or firm is invested in them and their professional growth. When we offer those programs in-house or pay for programs outside of the firm, it emphasizes the value we put on developing our employees.”

For job candidates, professional development has also become a top priority when looking for their next position. Gen Z in particular is more interested in companies that offer concrete learning opportunities on-the-job, according to the 2024 LinkedIn Workplace Learning Report.

“When meeting with potential employees on any level, we talk about training programs in great detail,” says Cramer. “It is something many candidates ask about now, so they are looking for it. It is part of their job search and decision-making process.”

IMPLEMENTING AN EFFECTIVE PROFESSIONAL DEVELOPMENT PROGRAM

When building a professional development program, firms have many options to consider beyond the usual continuing education requirements for lawyers. Some popular ways to provide career training for employees include conferences, workshops, seminars, small-group coaching, mentoring and e-learning platforms. No matter the approach, though, the number one concern for many business leaders at law firms is often attendance, especially when time spent learning may not apply as billable hours.

“Many firms struggle with getting people, especially lawyers, to show up for training – whether it’s virtual or in-person,” says Jon Krop, Founder and Chief Executive Officer of Flourish Legal Well-Being. “So the biggest challenge tends to be attendance or engagement.”



Offering billable credit for professional development time is one way to help encourage staff to participate. But that may not always be a feasible solution. The following strategies can help in building a more engaging and effective professional development program.

Talk with staff.

Asking lawyers and support staff what they are interested in learning or what problems they need help in solving can provide valuable information and direction for your approach to career training. Talking with staff can also help you learn how best to tailor content for your audience, says Krop. It can give firms a sense of what their employees are struggling with and how they think and talk about those things. That input can help firms choose the most appropriate language, examples and techniques for their staff.

Involve staff in training development.

You can maximize your professional development program by involving current staff in the creation of it. For instance, at Baker Sterchi Cowden & Rice LLC, several staff members were selected to help develop in-house boot camps on the full litigation cycle for new associates and paralegals. In this six-week pilot program, staff met for a few hours each week to hone skills in preparing for a deposition, practicing good timekeeping, getting ready for trial and more. Through this approach, both participants and trainers gained valuable career development.

“During the fast-paced workweek, employees often can’t set aside long periods of time for learning and development. Giving people quick, bite-sized training over time — and when they need it — can be an effective strategy.”

“By using in-house staff, trainers got additional development, too,” says Cramer. “For instance, senior paralegal staff were able to develop their presentation skills in putting the training together and doing it for us.”

Break up training into smaller segments.

During the fast-paced workweek, employees often can’t set aside long periods of time for learning and development. Giving people quick, bite-sized training over time — and when they need it — can be an effective strategy.

“When developing training for firms, we use short sessions,” says Krop. “So instead of doing a traditional 60- or 90-minute session, we’ll do three 30-minute sessions across three weeks. That gets more touch points with staff and makes it much easier for staff and lawyers to slip the time into their calendar.”

Consider training that supports the whole person.

Today’s workers are looking for companies that support better work-life balance, according to the American Psychological Association’s 2023 Work in America Survey. Training on stress management, emotional regulation and even fitness and nutrition can help staff perform better and avoid burnout. Such services can also make firms more attractive to prospective employees.

“Cultivating skills around well-being, thriving in your work, managing stress, performing at your best under pressure — all those things seem quite clearly part of the learning and development trajectory for lawyers and other staff,” says Krop. “Employees taking care of themselves translates into better business and client servicing overall.”

Make it a teach-me moment.

Employees often gain valuable knowledge from attending conferences and workshops. But your budget may limit these opportunities because of the cost of travel and other related expenses. Encouraging employees who attend such events to share what they learned with other staff members can help mitigate cost. At the same time, employees gain confidence and credibility while advancing their career.

In the long-run, investing in a professional development program can be a cost-savings strategy that benefits both the firm and its employees. “Professional development is an investment,” says Cramer. “It takes time and money. It’s not inexpensive to offer professional development, but it’s so important.”

ABOUT THE AUTHOR



Laura Semko is a professional writer and editor who enjoys creating meaningful content on topics related to personal growth, health, and wellness. She has a master’s degree in Writing from DePaul University.

She is also a member of the American Medical Writers Association and the Editorial Freelancers Association.

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KPIs: The Keys to Tracking Profitability

Key performance indicators are the metrics that matter.

BY KELLY F. ZIMMERMAN



“If you have a small or solo practitioner, they may just be flying by the seat of their pants, without a plan and just trying to get billing out once a month and doing nothing more.”

Matthew Sullivan, Founder of law firm consulting business Unravel Legal, started his company after scratching his head over how so many law firm owners, particularly from smaller firms, were having trouble paying themselves at the end of the day. Noting a lack of financial competency and business model formation within the small firm sector, Sullivan, who also chairs ALA's Professional Development Advisory Committee, found his niche with helping smaller firms more efficiently manage their numbers.

According to Sullivan, tracking numbers without having a plan in place for how to use the data is the No. 1. mistake he sees many firms making.

“If you have a small or solo practitioner, they may just be flying by the seat of their pants, without a plan and just trying to get billing out once a month and doing nothing more,” Sullivan says. “They’re just trying to work as hard and as fast as they can without looking at what’s working, not working, let alone whether it’s profitable or not.”

Sullivan's observations are on point with other findings. More than 8 in 10 respondents from an Above the Law survey report cited choosing which KPIs to track as one of their top two challenges.

While there are countless KPIs a firm may be able to track — from realization rates to client acquisition costs and billable hours — the most telling number for measuring a firm's success should be profitability at both the individual and firm-wide levels. However, this number isn't as easy to calculate as one may think on an individual level, and, as Sullivan says, every firm assigns its costs differently and that can have a huge impact the profitability of any one individual timekeeper. This can seriously impact your understanding of individual profitability and affect your decision-making and bottom line.

So what can your firm's profitability tell you? And what KPIs are the metrics that matter? Let's take a look.

1. BILLING

Your billing structure can be an indicator of how well your firm is performing, Sullivan says, and he doesn't just mean billable hours. It's possible you may have staff on payroll who aren't billing their time because they serve in a more administrative function. If this is the case, then you may want to get creative and figure out a way to track their performance as it relates to your operations.

For example, if an employee is responsible for new business or prospect intake, how does their output compare to your client conversion rate? If their responsibilities are more task-based, is it possible to track their efficiencies or workflows? Forbes recommends tracking staff utilization to compare how much staff time is dedicated to billable compared to nonbillable work.

Of course, there is also the easy — although not always so simple — task of tracking your time to figure out how you're spending it, regardless of whether you're working in a flat-fee, contingency or hourly model.

"If you're not keeping track of your time, you will never know if you're profitable enough," Sullivan says. "You will never know if you're charging enough. You won't understand your margins or your numbers well enough to adjust to any changes within the market."

2. MARKETING ROI

Not all law firm expenses center around billing and conducting business. Remember: You can't bill a client if you haven't even gotten them through the front door. With that in mind, take note of what you're spending on

marketing to bring clients to your firm and whether the return on investment is worth it.

As you begin to dig through your metrics, consider a few common marketing KPIs that can help you gauge how your costs compare to your revenue, and if your marketing expenses are worth the results you're seeing. Some examples include:

Qualified Leads

This is the number of overall leads your marketing campaigns generate compared to how many of those leads fit your client profile. You can also take a look at your cost per lead, which can help you figure out how much you are spending on marketing efforts to generate each lead.

Conversion Rates

These comprise the number of leads that are either taking action with your firm after receiving a communication or signing on as a client after a consultation. You can track conversion rates for different types of actions, from filling out an inquiry form to signing a contract with the firm.

Customer Lifetime Value (CLV)

This metric equates to the total amount of revenue a law firm can expect to earn from a client during the entirety of their relationship. According to an article from SaaS marketing firm Semrush, "CLV is a vital metric for understanding your business. To be profitable, your CLV needs to be higher than your sales and marketing spend for acquiring a single customer."



“If you have multiple practice areas, figure out which practice areas are profitable and which ones aren’t. Which ones are cross-selling well and which are bringing in the most revenue? Also, take a look at how effectively you are leveraging different areas of your business to cross-sell.”

3. REALIZATION RATES

You can generate all the business in the world, but it won’t matter if your clients aren’t paying their bills. Low realization rates – which is the percentage of how much a law firm bills compared to how much it receives in payment – can be a sign that something is amiss, whether the issue revolves around client relationships, poor contract parameters or an administration issue in house.

There are different types of realization rates, so taking a look at your stats for both collections (invoiced time) and billing (how much you are billing compared to the hours you’ve put in) can reveal a lot about your profit margins.

4. PRACTICE AREA

If you’re trying to get a handle on your firm’s profitability, Sullivan recommends trying to figure out your organization’s main source of income. “If you have multiple practice areas,” he says, “figure out which practice areas are profitable and which ones aren’t.” Which ones are cross-selling well and which are bringing in the most revenue? Also, take a look at how effectively you are leveraging different areas of your business to cross-sell.

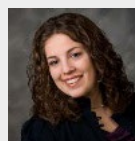
THE BOTTOM LINE KPI: FIRM PROFITABILITY

While profitability is typically a key indicator in how well a firm is performing, it can still be tough to figure out which KPIs are driving that take-home number. However, Sullivan

says, looking at your numbers through the lens of who is receiving the information and as part of a larger equation can help.

“The context to those numbers actually matters,” Sullivan says. “If you’re just looking at numbers in a black and white fashion, you’re going to wind up pulling your hair out.”

His advice to help better track more convoluted or not-so-obvious outcomes: Explore. “If you’re trying to gather more information, be creative. Challenge yourself on what data you’re going to grab and how you’re going to grab it.”



Kelly F. Zimmerman is a former Managing Editor of Legal Management. After wrapping up her time with the magazine and ALA, she spent several years as an editorial lead in the fintech space, where she learned firsthand how to cross-functionally collaborate with legal and compliance teams. She has continued to create content for the legal industry with organizations like Northwestern’s Pritzker School of Law, Axiom Law and Thomson Reuters.

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The AI Overwhelm: How Legal Management Professionals Can Avoid Burnout and Stay Productive

AI can be helpful for legal operations, but follow these tips to avoid feeling overwhelmed by it.

BY RACHEL STRELLA



“As AI takes over administrative tasks, it’s easy to lose sight of the human element. AI can handle much of the behind-the-scenes work, but client relationships and team collaboration still require a personal touch.”

As artificial intelligence (AI) becomes a more integral part of legal operations, those working on the business side of law firms face unique challenges. Whether it’s managing AI-driven marketing tools, automating workflows, or streamlining billing and document management, the rapid pace of AI’s evolution can quickly become overwhelming.

While AI offers tremendous opportunities for improving efficiency, it can also bring about burnout. For legal managers, the key to managing AI without feeling overwhelmed is to stay productive and maintain a balanced workload. So, how can legal managers incorporate AI effectively without burning out?

1. DON’T FEEL THE PRESSURE TO KEEP PACE WITH AI

AI tools seem to evolve daily, with new features designed to streamline tasks like marketing automation, case management and client communication. For legal managers, trying to stay ahead of these advancements can feel like a full-time job. Whether it’s a new marketing platform or an updated document automation system, there’s always something new to master.

Tip: Set aside specific time to explore new tools regularly. Instead of reacting to every AI development, designate times to evaluate what's relevant for your firm. This helps you focus on tools that truly align with your firm's goals.

2. AVOID OVER-RELIANCE ON AI FOR CREATIVE MARKETING

AI has revolutionized marketing by generating content ideas, automating social posts and analyzing client data to tailor campaigns. However, relying too heavily on AI can result in impersonal marketing. While AI can suggest efficient solutions, it doesn't always capture the emotional insight necessary to build connections.

For legal firms, where client relationships and trust are paramount, this lack of human connection can be damaging.

Tip: Use AI to support — not replace — your creative process. AI can speed up tasks like content ideation or audience targeting, but your insights are key to making sure the marketing resonates with your audience. In law, where trust and personal connections matter, your firm's unique touch makes all the difference.

3. NAVIGATE THE AI LEARNING CURVE

For many legal management professionals, AI tools present a steep learning curve. Even tools that promise to make workflows more efficient require time to master. Whether it's using AI for billing, scheduling or document review, the time and effort required to learn new systems can feel overwhelming, especially when added to an already full workload.

Tip: Start small. Focus on solving one problem at a time. Begin by using AI to automate a routine task like scheduling or document management. As you and your team become more comfortable, you can expand AI's use into other areas of your firm without overwhelming the team.

4. PRESERVE THE HUMAN ELEMENT

As AI takes over administrative tasks, it's easy to lose sight of the human element. AI can handle much of the behind-the-scenes work, but client relationships and team collaboration still require a personal touch. Legal marketing, in particular, benefits from human interaction, as clients value a personal connection when choosing a firm.

Tip: Use AI to free up time for building relationships. Automating routine tasks gives you more time to engage with clients and collaborate with your team. AI should enhance your ability to connect with clients, not replace it.

5. BALANCE EFFICIENCY AND ETHICS

Another challenge of AI is maintaining ethical standards. AI systems are trained on vast amounts of data, and sometimes these datasets can reflect biases or inaccuracies. Left unchecked, AI can perpetuate biases or generate outputs that misalign with your firm's values. For legal management professionals, where trust, fairness and integrity are crucial, this risk must be addressed.

Tip: Regularly review AI-generated content and outputs to ensure they align with your firm's values. Establish clear ethical guidelines for AI use and involve your team in reviewing potential concerns. By maintaining oversight, you'll ensure that AI supports your firm's mission while avoiding legal or ethical issues.

AI has the potential to transform legal management by streamlining processes, improving marketing efforts and freeing up time for higher-level tasks. However, if not approached thoughtfully, it can lead to burnout. By setting boundaries around AI use, gradually integrating the tools and ensuring they enhance — rather than replace — the human connection at the core of legal relationships, legal managers can make the most of AI without feeling overwhelmed.

ABOUT THE AUTHOR



Rachel Stella is the Founder and Chief Executive Officer of Stella Social Media, where she has spent 15 years helping businesses integrate digital strategies effectively. Her insights have been featured in publications such as *Social Media Today*, *Forbes* and *PR Daily*.

 strellasocialmedia.com/

 [linkedin.com/in/rachelstrella/](https://www.linkedin.com/in/rachelstrella/)

My Social Media Reboot

How my decision to take a break from social media led to a period of calm, self-discovery and a positive mindset shift.

BY KARIE RIVKIN, CLM



“**With this weight lifted, I can worry less about the things I can’t control and focus on the beautiful life surrounding me.**”

I enjoy learning from and listening to others, and that, coupled with my love for technology, made me the perfect target for social media. I welcomed it with an open mind and palms.

As social media advanced and more platforms launched, I joined, connected, friended, shared and posted. With work, children and pets, this method is the next best way to get updates on family and friends if I can’t be in person.

While I don’t consider myself chronically online, unfortunately, as time continued and my social media usage increased, my positivity was slowly replaced with hopelessness and sadness. Even attempts at lighthearted stories (babies cooing, puppies playing) gradually led me down a darker path. Finally, after countless bouts of gloom and doom – the final straw being the political posts – it became clear that I needed to do something drastic. In July 2024, I exited from all social media apps except LinkedIn.

The first two weeks were challenging. This shouldn’t have surprised me, because much of my free time lately had been spent on social media. To

make it worse, I hadn't removed the notifications, so my apps teased me with snips of what I was missing. My finger kept hovering over those apps. Should I open them? Is it important? What other ways can I obtain this information?

But I didn't do it; I didn't click to open. Instead, when the urge hit, I replaced that habit with other things, such as attending events, cleaning out a closet (OK, many closets), exercising, making home repairs, working with my dogs or old-schooling it with a call or text to family or friends.

THE RESULTS

After a few months, it was evident that I was returning to a happier place, appreciating the present and the things I have in my life. I also had more time to do what I enjoy and to think about my future. I realized that I was becoming distracted by social media — a life, and possibly even possessions that didn't align with me: my needs, financial status, personality or vision. With this weight lifted, I can worry less about the things I can't control and focus on the beautiful life surrounding me.

To paraphrase the words of Vladimir Elie, we don't decide our personality, our temperament, innate attributes, or the mental and emotional characteristics we are born with. But as an adult, by the decisions we make and the actions we take, we can decide how to act and react. We can participate in our own "programming."

So, while my time off social media is wise, I recognize that it may not have been responsible for my demise. Perhaps, instead, it was my mindset. I let myself be distracted by negativity and sadness and allowed myself to be taken down those paths.

However, even if I can't blame social media, I still believe that I need some self-policing rules when I return. For example, I must focus on family and friends and limit my time and what I view. When I wish to connect with someone, it won't be a like, post or comment; instead, I will call or meet face to face, because some of what was making me unhappy was the lack of that more profound connection. Finally, I vow to be more intentional, taking action by volunteering or donating to the causes I wish to support.

On January 2, I was ready: I logged back in and read a few posts. Guess what? Though the thought of reengaging made me a bit anxious, my return was anticlimactic! My time off, while productive, made it apparent that social media wasn't the culprit. With my better-aligned mindset and new rules, I can now look forward to 2025 with a new and improved me and social media presence.

ABOUT THE AUTHOR



Karie Rivkin, CLM, is the Chief Financial Officer for Eichelbaum Wardell Hansen Powell & Muñoz, PC. A member of ALA since 2000, Rivkin has held many leadership positions both in the Austin

Chapter and internationally, where she currently serves on the Certification Committee. Devoting her career to the legal industry, Rivkin appreciates innovation, collaborating with coworkers and business partners to improve the firm's operations in all areas of the business of law. She strives to maintain a healthy lifestyle (entertainment, exercise, and food), but her most valued time is spent with her loving family and friends.



krivkin@edlaw.com

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