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Chasing the Fountain of Youth

Law firms are looking for the best ways to recruit and retain Gen Z employees.

LEGAL MANAGEMENT

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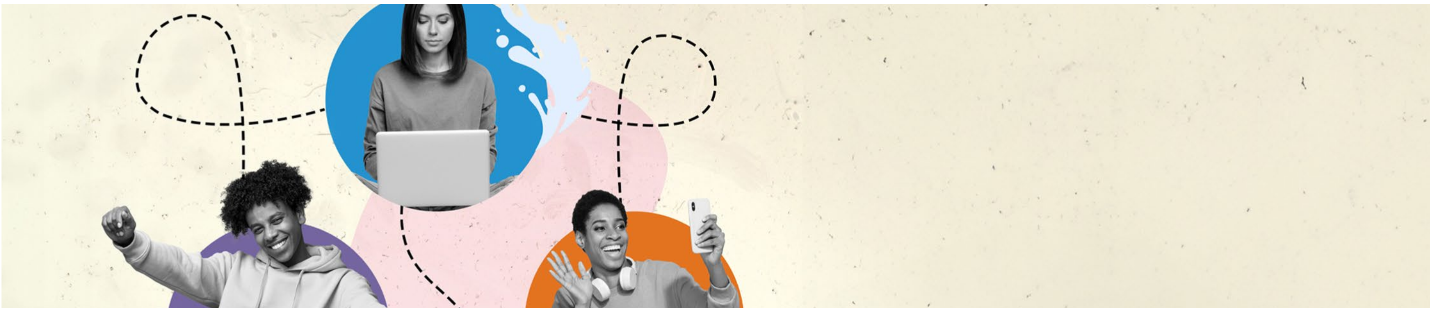

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ALA® Association of Legal Administrators

The Power of the Pivot

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PIVOT. PIVOT! PIVOT! Just hearing that word immediately brings me back to February 1999 when, on an episode of Friends, Rachel and Chandler work with Ross to try to fit a couch up a cramped flight of stairs. Ross, the owner of said couch, desperately screams at his "friends" to pivot with the couch as they attempt to make their way up.

This iconic scene has since produced memes, gifs and one of the TV show's most memorable moments. (They eventually have to cut the couch in half and Ross' attempts to return it are mostly unsuccessful.) While Ross's couch may have ended up in pieces, the scene evokes a powerful lesson in flexibility and problem-solving for the legal industry.

In the fast-paced world of legal management, the ability to pivot is not just a valuable skill — it's an essential one. As legal managers, we are constantly faced with evolving challenges and shifting landscapes, requiring us to adapt quickly and effectively.

Not all stories about pivoting involve broken couches and frustrated friends. Sometimes, pivoting means leaning into a backup plan that may sound absurd to others, but is just far-fetched enough to work.

One such example comes from ALA's 2024 Chapter Leadership Institute (CLI). This annual event exists to provide current and future chapter leaders with training, education and resources to better prepare them to lead their chapters. This past July, over 200 members gathered in Salt Lake City for CLI, showing off their takes on the theme "Legends and Superheroes." On the first full day of the conference, we all woke up to news of a global IT shutdown caused by a bugged patch from a cybersecurity company. Computer systems worldwide were affected. While some members scrambled to address issues at their firms, others counted their blessings to be away from the chaos, focusing on CLI's activities instead.

> "These everyday pivots are the backbone of ALA and its members. They reflect our adaptability, resourcefulness and dedication to maintaining stability amidst disruption. The benefits of pivoting when plans change are immense."

That relief was short-lived. The airline industry was among the hardest hit, and attendees soon faced flight delays and cancellations. While a lucky few managed to leave on time, many were stuck in Salt Lake City for days longer than planned. Among them were three members of the Philadelphia Chapter's Board of Directors. With their flight home canceled and no immediate options available, they had to think on their feet.

Alexa Santangelo, President-Elect of the Philadelphia Chapter, worried about others facing the same predicament, rented a seven-passenger SUV. She spread the word, and Melissa Hauser, Treasurer of the Independence Chapter, joined Alexa and two other Philadelphia Chapter Board members — Mayda Aponte and Phyllis Florio — for an unscheduled, unplanned cross-country road trip. Although Melissa didn't know the other three well initially, she quickly embraced their plan to drive from Salt Lake City to Philadelphia with minimal stops.

"I needed to get home, and it was the most sure-fire way to do it," explains Melissa. Alexa had her own motivation: "I was hosting a retirement party at the firm and needed to make sure everything went off without a hitch."

Other members felt the pull of their work and family obligations. Alexa sums it up best: "I didn't want the airlines to have control over my return time. I didn't want to spend days stressed waiting for flights and sitting in airports without knowing anything for certain. We are leaders. Identifying a problem, brainstorming a solution, making a plan and executing it is just in our blood. We had just learned all those lessons at CLI. … I just never expected to put them to use so soon."

Once the decision was made, the wheels were quickly in motion. All four women agreed on a few simple ground rules (because, of course they did) with the most important being that if they were too tired to drive, just say so and someone else will drive without complaint. They drove 12 hours the first day, stopping for a few hours of sleep in Omaha, Nebraska, and completed their journey the following day. Along the way, they shared laughs and adventures, including taking a picture

with a giant bison in Omaha and attempting to eat at a diner specializing in bison meatloaf — only to find the restaurant was out due to a car show the week before. Melissa quips, "If legal administrators were running that restaurant, that never would have happened."

In total, their adventure took them 2,200 miles across eight states. "We were in such good spirits. We talked the whole time and while we were only acquaintances before, now we know everything about each other," Alexa marvels. They adapted quickly, found a solution and didn't look back.

Another compelling example of our members' incredible resilience and their ability to pivot under pressure also came out of CLI. Late Friday night, the Board of Directors learned that an emergency cancellation had left a 45-minute gap in the schedule for our opening general session. We could not cancel or reschedule the session. All 200 attendees were expecting something to start at 9 a.m.

We rallied the troops and suggested a full Board Town Hall. We divided up questions, arranged seating and took to the stage, many in casual attire they hadn't intended to wear on stage. One Board member was even in shorts. Though unpolished, the Town Hall was a success. The Board's ability to pivot showcased their authenticity, spontaneity and willingness to engage directly with attendees. The session was filled with candid conversations, genuine responses and a shared sense of community. Yes, there were some mistakes. But we laughed together, and as usual, ALA's members gave us grace and lifted us up. It was a testament to the power of quick thinking and collaboration under pressure.

So, while those stories are great examples of change under pressure, pivoting isn't confined to grand events or cross-country road trips. It happens every day in our roles as legal managers. Consider the accounting manager who meticulously crafts financial reports by hand when the billing system crashes, the HR manager who swiftly reorganizes staffing in response to unexpected departures, or the chief operating officer (COO) who seamlessly steps in to lead a meeting when the managing partner is delayed.

These everyday pivots are the backbone of ALA and its members. They reflect our adaptability, resourcefulness and dedication to maintaining stability amid disruption. The benefits of pivoting when plans change are immense. They demonstrate our resilience, creativity and commitment to success — no matter the circumstances. When we quickly and efficiently react to and embrace change, ALA members continually prove themselves, ensuring we can overcome any obstacle and emerge stronger.

These stories from CLI are testaments to the strength and spirit of our community, reminding us all of the incredible power of the pivot.

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Chief People Officer
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Attracting and Hiring Gen Z to Your Law Firm

As Gen Z rapidly enters the workforce, legal administrators face unique challenges and opportunities in attracting and hiring this new generation.

Born between 1997 and 2012, Gen Z is poised to overtake Baby Boomers in numbers within the workplace, bringing fresh perspectives and new expectations. Understanding what drives this generation and how to appeal to their values is crucial for legal firms aiming to stay competitive in a dynamic talent market.

UNDERSTANDING GEN Z

Gen Z is the first generation of true digital natives, having grown up in an era where the internet, social media and mobile technology are ubiquitous. This upbringing has significantly influenced their values, work preferences and expectations from employers.

While no generation is a monolith, they do tend to share some key characteristics. For Gen Z, some of those include:

- **Tech-Savvy:** Gen Z expects seamless digital experiences at work. Outdated or inefficient systems can be a significant source of frustration for them.
- **Value-Driven:** This generation places a high emphasis on ethical business practices, diversity and inclusion. They are more likely than previous generations to turn down job offers from companies that do not align with their personal values.
- **Work-Life Balance:** Unlike the hustle culture embraced by millennials, Gen Z values a clear boundary between work and personal life. They are vocal about their need for flexibility and fulfilling work.

With this in mind, there are things you can do to make your legal organization attractive to Gen Z recruits:

> "Gen Z places a high value on continuous learning and career development. Providing opportunities for growth can make your firm more attractive to young professionals."

1. Cultivate a Strong Company Culture

A positive company culture is a significant draw for Gen Z candidates. Our research shows that outside of salary, company values and culture are major motivators for job seekers.

To build a culture that attracts Gen Z:

- **Promote Diversity and Inclusion:** Ensure your firm actively supports a diverse and inclusive workplace. This not only appeals to Gen Z but also fosters a richer, more innovative environment.
- **Emphasize Ethical Practices:** Demonstrate your commitment to ethical business practices and corporate social responsibility. Gen Z is particularly attuned to companies' stances on social and environmental issues.

2. Leverage Technology

Gen Z expects the same level of digital fluidity at work as they experience in their personal lives. Investing in modern technology not only attracts young talent but also streamlines operations, benefiting all employees:

- **Update Digital Infrastructure:** Ensure your firm's technology stack is up-to-date and supports remote work and collaboration. Tools that enable flexible working conditions are particularly attractive to Gen Z.
- **Adopt AI and Automation:** Implement AI tools to enhance employee experience and streamline repetitive tasks. This can help mitigate concerns about job security and position your firm as a forward-thinking employer.

3. Offer Flexible Work Options

Flexibility in work location and schedules is crucial for attracting Gen Z talent. The COVID-19 pandemic has solidified the desire for flexible work arrangements across all generations:

- **Remote Work Opportunities:** Offer remote or hybrid work options to accommodate different lifestyles and preferences. This flexibility can also help retain older employees who may prioritize personal time over traditional work hours.
- **Flexible Schedules:** Allow for adjustable working hours to help employees balance their professional and personal lives more effectively.

4. Focus on Professional Development

Gen Z places a high value on continuous learning and career development. Providing opportunities for growth can make your firm more attractive to young professionals.

- **Invest in Training Programs:** Offer robust training and development programs that help employees advance their skills and careers. This not only aids in retention but also ensures your firm remains competitive.
- **Mentorship Opportunities:** Establish mentorship programs that pair Gen Z employees with experienced colleagues. This fosters knowledge transfer and helps integrate new hires into the firm's culture.

5. Communicate Your Values

Transparency and authenticity are critical when communicating your firm's values to potential hires. Gen Z wants to work for organizations that align with their personal beliefs and are not afraid to show it:

- **Showcase Company Culture:** Use your website, social media and recruitment materials to highlight your firm's culture, values and employee experiences. Real stories and testimonials from current employees can be particularly persuasive.
- **Engage in Social Listening:** Monitor social media and industry forums to understand what Gen Z is saying about employers and the job market. This can provide valuable insights into how your firm is perceived and where improvements can be made.

Attracting and hiring Gen Z requires a strategic approach that aligns with their values and expectations. By fostering a positive, inclusive culture; leveraging modern technology; offering flexible work options; investing in professional development; and transparently communicating your values, legal administrators can successfully attract and retain this new generation of talent.

Embracing these strategies will not only appeal to Gen Z but also contribute to a more dynamic, resilient and future-ready workforce.

ABOUT THE AUTHOR

Amy Mosher is the Chief People Officer at isolved, where she is accountable for the overall people strategy. With over 20 years of global human resources experience, she has contributed to the success of several progressive multinational public and private companies in various industries including biotechnology, hardware and software. She is a subject matter expert in organizational development, compensation, talent acquisition, operations and compliance. But her favorite part of the role is as a mentor working toward the enablement and future career development of her staff and all of the employees at isolved.

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JAN VAN HOECKE
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AI Use Cases for Legal Management Professionals Are Growing

Novelty? Or practical technology? That was the question on people's minds when generative artificial intelligence (AI) first emerged.

Just a few short years later, the use cases for AI in the legal realm are starting to snowball as it helps with a growing number of tasks — and puts to rest any lingering question around AI's utility for legal administrators.

> "Of course, to successfully deploy AI for any of these use cases, there's some groundwork that needs to be laid ahead of time. For starters, companies should evaluate their information architecture's current condition."

1. Simplifying review of employee agreements

Say that a corporate human resources user is tasked with looking at the last six months of employee agreements and reporting on salary trends and whether they include a termination clause. The user can run a search for "employee AND agreement," then filter by appropriate library, and then narrow by matter/workspace and date range. This will get them a collection of documents. However, that's just the start of the task, not the end of it. Completing the assignment means reviewing them one by one.

Instead, the user can use a generative AI-style chatbot to interact with those documents by asking, "What is the salary?" "Is there a termination clause?" and "Summarize the termination clause." The generative AI, in other words, takes over the burden of having to review the corporate employee agreements and find the relevant information.

From there, it's easy for the HR professional to export the results to Excel and prepare a report on what the findings show. The key element here? AI has enabled them to spend more time on the high-value aspect of the task — interpretation and analysis of the findings — rather than the grunt work of gathering the data.

2. Automatically triaging requests for contract review

Let's take the case of the support team within a corporate legal department. This team deals with hundreds of contract queries every week and is overloaded with work. They might have a ticketing system in place to receive those queries, but all requests for contract review are manually triaged, directed and dealt with.

This is a prime area for AI to lend a hand and streamline the process. A generative AI tool can extract key information from the request and hand it off to the ticketing system. The overloaded corporate legal team no longer has to waste time on manual triage: Work is automatically routed to the appropriate workflow. As a result, they can focus on doing other aspects of their job and responding to their clients faster.

3. Taking the pain out of compliance management

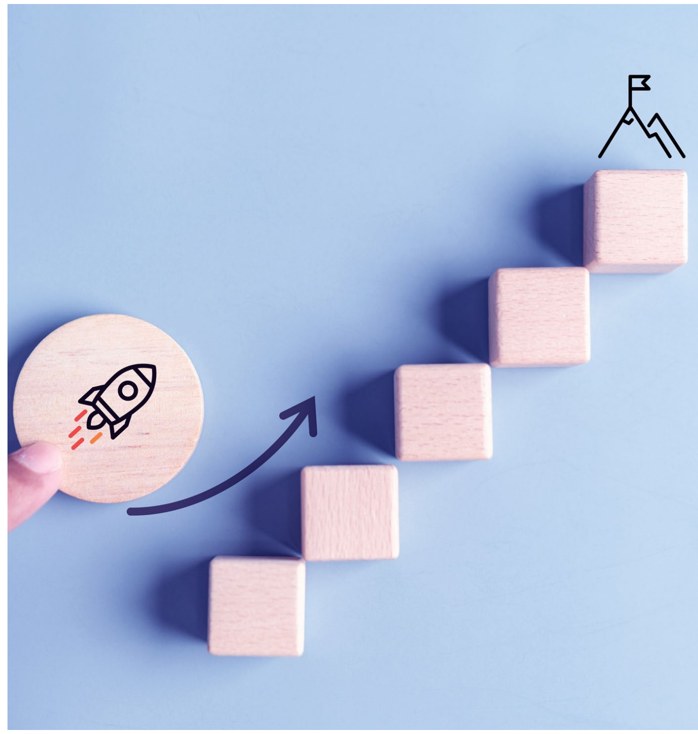
Within organizations, there are often playbooks that serve as essential guidelines for structuring contracts with customers, vendors and other business entities. These playbooks define necessary contract clauses, set parameters and ensure consistency across agreements.

AI can play a crucial role in this context. When drafting a new contract, an intelligent AI agent can continuously cross-reference the contract with the playbook — ideally during the early stages of creation. If any deviations occur, the AI promptly identifies and highlights them.

The AI can extend its utility even further by assessing an organization's existing contract portfolio against any updated playbooks. Manually verifying compliance would be a particularly time-consuming effort, especially if there's a large volume of contracts. AI can perform this task either on an ad hoc basis for specific contracts or by analyzing all contracts within a specific sector to pinpoint deviations from the latest playbook. This practical application of AI significantly streamlines the process for busy professionals.

4. Laying the groundwork for success

Of course, to successfully deploy AI for any of these use cases, there's some groundwork that needs to be laid ahead of time. For starters, companies should evaluate their information architecture's current condition. Training generative AI's large language models (LLMs) requires data, raising important questions about the organization's reliable data sources. More specifically, identifying where these dependable data sets reside is crucial.



While a document management system (DMS) provides a solid base, it's merely an initial step. The vast array of documents in a firm's DMS may contain too much "noise," making it challenging for generative AI to discern the valuable "signal." It is more effective to introduce LLMs to a select portion of data — for instance, only the definitive versions of documents from a particular period, rather than every version dating back indefinitely.

However, technology is not the sole solution. It's essential to have dedicated personnel and processes to select the "optimal" data for training the model or validating the results. Establishing a robust knowledge management and curation framework within the company ensures the continuous upkeep of the training data set, rather than treating it as a sporadic task. Once this groundwork is in place, organizations are well positioned to start reaping the benefits of AI across a rapidly growing number of use cases.

We are only just starting to scratch the surface of ways to put AI to work, which means that there are plenty of use cases and benefits waiting to be discovered to help legal organizations deliver better business outcomes.

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Taking Charge of Your Legal Career Path: The Power of Personal Branding

> "Your personal brand is your guiding star, shaping decisions and actions. By aligning with it, you will find clarity and direction in your career journey."

Consider these three separate career scenarios:

Melanie recently joined an organization, but things are not falling into place as she hoped. Despite her experience, education and knowledge, she feels alienated by her new team and struggles to connect with key stakeholders. Every idea she proposes seems to meet resistance or indifference. Coming from a more casual work culture, she wonders if her expertise should outweigh fitting into the new environment. How can she make herself heard?

Johan and Mark both struggle due to their poor treatment of others, hindering collaboration. Johan's inability to work in a team will limit him, despite his individual contributions. Mark's self-centered approach undermines trust and collaboration.

Johan contemplates leaving his firm after being passed over for yet another high-profile client. Despite being a top performer, he's labeled as difficult to work with, which he attributes to his pursuit of excellence. Feeling frustrated and discouraged, he is updating his resume.

Mark, a recent graduate, is always the first in the office and last to leave. Even on casual days, he dresses sharply. He quickly identifies key stakeholders and ensures they know who he is. Mark is competitive and prefers working alone to avoid sharing credit. He's shocked when he is not selected for a high-profile project.

Despite their differences, Melanie, Johan and Mark share a common issue: a branding problem. Each has unwittingly developed a personal brand that hinders their effectiveness, upward mobility and personal satisfaction. In this article, we will explore how personal branding can either hinder or help you.

NAVIGATING PERSONAL BRANDING: OVERCOMING CAREER HURDLES

In today's professional landscape, the responsibility for managing your career trajectory rests squarely on your shoulders. Gone are the days of relying solely on organizations to shepherd you through a linear progression. Instead, the emphasis has shifted toward lateral moves and the proactive navigation of your own path. This transition underscores the importance of identifying, defining and actively managing your personal brand.

A personal brand demands active focus and deliberate action on your part. It serves as a means to differentiate yourself from your peers and allows you to showcase your expertise, unique capabilities and strengths — essentially, what makes you exceptional.

3 ELEMENTS TO CONSIDER

To establish your brand, start by defining it. Reflect on your personal strengths and passions. What drives you? Are you competitive? A connector of people? A problem solver? A meticulous researcher? Are you more inclined to work independently or lead others?

Next, consider the value your strengths and passions bring to your target audience. For instance, if you're competitive, this might translate to fiercely advocating for a client. If you're a connector, you might excel at identifying and pursuing unique business opportunities or mediating internal conflicts. Craft your narrative with your audience in mind — whether it is a client, employer or internal committee. How can you tell your story to showcase the unique blend of skills and talents you offer?

Once you have honed your personal story — your brand — document it and review it. Ensure it authentically reflects your story and motivations. Then, evaluate the messages you are currently sending. Every action — or lack thereof — influences your brand.

Your reputation is shaped by three main factors: professional performance, professional behavior and professional interactions.

1. Professional performance is paramount.

Ensure your work is accurate, timely and thorough. Take personal responsibility for the quality of your work, avoiding shortcuts that compromise integrity. Exceed expectations whenever possible, treating your team and supervisors as internal clients.

2. Professional behavior encompasses every action and decision you make.

Be mindful of your social media presence and how it reflects on your professional image. Remember, work-related social events are extensions of your professional environment, not opportunities for unprofessional behavior.

3. Professional interactions are critical.

Treat others, especially subordinates, with respect. Your tone, word choice and management style contribute to your brand. Be fair and objective, focusing on behavior or performance rather than individuals when addressing issues.

Externally, actively cultivate your presence. Engage purposefully on platforms like LinkedIn, sharing insights and networking with peers. Consider writing articles or volunteering for speaking engagements to establish yourself as a subject matter expert.

Building your personal brand is an ongoing process, requiring regular investment. Take the time to identify and strategize how to establish your brand within your organization and beyond. Make daily deposits into your brand through your communication, engagement and performance. Remember, managing your brand is key to steering your career path.

WHAT DO YOU WANT TO BE KNOWN FOR?

Developing your personal brand starts with identifying what you want to be known for. Research, reflection and declaration are key steps. If repair work is needed, an accountability partner can help. Evaluate your behavior regularly against your brand.

Your personal brand is your guiding star, shaping decisions and actions. By aligning with it, you will find clarity and direction in your career journey.

ABOUT THE AUTHOR

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Creating an Effective Benefits Package

PHILLIP M. PERRY

Freelance Business Writer

> “You need to make sure you’re putting money and resources into reinforcing what makes life measurably better at work, and that means taking time to build a community and a team. I would say that’s as important — if not more important — than the dollars spent on benefits.”

Benefits packages can play a key role in retaining top employees.

To attract, motivate and retain “A players,” law firms must tailor their benefits to society’s evolving demographics and lifestyles. Today’s employees expect more than the standard health care policy and retirement savings plan.

In fact, an attractive benefits package has been a key driver of growth at JVAM, which has expanded over the past three years from a nascent law firm with five attorneys to one with 16 attorneys in five Colorado locations. “We are trying to create a culture that’s collaborative, professional, enjoyable and that recognizes everyone’s effort and contribution,” says Jonathan Delk, the firm’s Chief Executive Officer (CEO). “Our benefits have helped us attract and retain top talent, by reflecting a culture that makes people feel cared for and important.”

The JVAM experience is just one example of a larger trend, as law firms retool their benefits to meet the needs of a new workforce. The goal is to attract, motivate and retain top quality staff. “It used to be that health insurance and a retirement savings plan were all an employer needed [to offer],” says Lauren Winans, CEO and Principal Consultant at Next Level Benefits. “Times have changed. Today’s younger employees want benefits that help them achieve work-life balance and prepare for the future.”

What’s driving the change? Two important forces are the ubiquity of two-income families and the need for intergenerational care. These have led to an increase in the prevalence of childcare subsidies, caregiver support and flexible time off. “The biggest trend I have seen recently is toward offering paid parental leave,” says Mark Stratton Berry, Senior Human Resource Specialist at Insperity.

Mental health coverage is also on the upswing, as younger people express a heightened awareness of the importance of psychological well-being. Employers, for their part, are starting to realize that stressed workers find it difficult to be fully engaged and are likely

> "The benefits environment is not one-size-fits-all. Employers should inventory their demographics and customize their benefits plans appropriately."

to have high absenteeism records. (For a comprehensive list of trending benefits, see the sidebar, The New World of Employee Benefits.)

Offering just the right benefits mix can enhance performance throughout the workplace, raising profitability. "Providing benefits helps keep your employees well, physically and mentally," says Julie Stich, Vice President of Content at the International Foundation of Employee Benefit Plans (IFEBP). "And that means they will be more productive."

TREADING CAREFULLY

Good intentions are one thing. Selecting the right providers is another. That's particularly the case with mental health coverage. "Many employers believe they are offering psychological support benefits through their insurance carriers," says Winans. "But the fact is that there are often insufficient counselors, therapists, psychologists and psychiatrists to help all of the people in need."

Today's Employee Assistance Plans (EAPs) often include mental health services, typically providing lists of nearby doctors, therapists and psychologists but leaving the employees to track down appropriate providers. That task can be nerve-wracking in itself, adding to employee stress. And the scarcity of available professionals means obtaining help can take a long time. In response, noted Winans, many companies are utilizing new technologies in the form of free counseling apps, and memberships in private services that provide help with meditation or with connecting to counselors at convenient times.

Employers may also sign up third-party intermediaries to proactively match employees with appropriate providers, saving considerable time and energy. These services often work with whatever insurance company the employee has and will even find free or low-cost services for people with no insurance. They may also follow-up to ensure that employees connect with therapists who are helpful and appropriate.

UNIQUE NEEDS

Every workforce is different. What employees want at one company may differ from what they want at another. "The benefits environment is not one-size-fits-all," says Suzanne Haslam, Senior Vice President at Woodruff Sawyer. "Employers should inventory their demographics and customize their benefits plans appropriately."

Haslam gives some examples:

- **Younger individuals:** Consider family-forming coverage such as parental leave and support for fertility, adoption and surrogacy. Once these individuals have families, expand services to include lactation consulting, return to work support and child care services.
- **College graduates:** Potential benefits include debt consolidation services and financial wellness and home buying support.
- **Middle-aged colleagues:** Do they need assistance in planning for their child's education? Is someone in the sandwich generation caring for both kids and parents? Would elder care services be appropriate? Women may be looking for menopause support services.
- **Older individuals:** Those approaching retirement may appreciate financial wellness and Medicare planning support services.

No matter how diverse the benefit needs of the workforce, though, staff members need to feel that the firm is treating everyone equally. At JVAM, all the firm's 25 employees — regardless of if they practice law or are legal support staff — enjoy the same benefits. These include 100% of the premiums for family medical, dental and vision. The firm also funds Health Savings Accounts (HSAs) up to the value dollar of the deductible. A plethora of other benefits include Flexible Spending Accounts (FSAs), long- and short-term disability, and life insurance at two times the value of each person's salary.

TAKING SURVEYS

The variety of possible benefits is extensive, and assembling the right package can incur serious costs. Employers can get the most bang for their buck by carefully selecting benefits that pull their weight. And that means going to end users for input.

"Often employers will think employees want one set of benefits when, in reality, they might be looking for something completely different," says Kelsey Martin, Client Executive at

OneDigital, a benefits consulting firm. "So it's important to get everyone on the same page by starting a conversation to better understand what people are looking for."

Surveys, conducted every year or two, can help. Employees should be approached with a statement such as this: "Are the company's offerings meeting your needs? If not, we want to hear about it so we can make our benefits program more meaningful. That will make it worth your while to work here, and also make it worth our while from a dollars and cents perspective. As an employer, we don't want to spend money on benefits you're not going to use."

KEEPING IT REAL

Designing an ideal benefits package is one thing. Funding it is another. Health coverage is expensive, and the dollars required to support physical wellness can hamper ambitions to extend coverage elsewhere.

"It's hard to balance the need for benefits against limited resources," says Winans. "The cost of health care goes up every year and tends to eat up the rest of the benefits budget. That makes it harder to offer a competitive retirement plan contribution rate, or a supplemental mental health program, or even give people more time off."

One possible tool for reducing the benefits bill: so-called "voluntary benefits." In these arrangements, employees can select from a menu of benefits that their employer does not normally offer. While the employee pays 100% of the bill, the premiums are reduced because the employer has arranged for a group policy. Among the benefits commonly found in the voluntary mix are insurance for life, supplemental disability, and auto and home.

Important as they are, benefits are only one piece in the employee satisfaction puzzle. If you're not in a financial position to pick up more of the benefits cost, look inward to how you can improve the workplace for staff.

"You don't retain people by just throwing dollars at another insurance or benefit package," says Delk. "You need to make sure you're putting money and resources into reinforcing what makes life measurably better at work, and that means taking time to build a community and a team. I would say that's as important — if not more important — than the dollars spent on benefits."

The New World of Employee Benefits

Most employee benefits programs must include coverage for health care and retirement. But there's a wide array of additional benefits in today's marketplace. Employee surveys will reveal which of the following are most valued:

- Parental leave
- Mental health coverage
- Dental insurance
- Family planning
- Financial planning
- Retirement planning
- Childcare
- Eldercare
- Professional development
- Telemedicine
- Flextime and paid time off
- Commuter support
- Hybrid work arrangements
- Virtual team bonding activities
- Fitness perks
- Student loan repayment assistance
- Long-term disability insurance
- Educational and career advancement opportunities
- Emergency savings accounts

ABOUT THE AUTHOR

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Chasing the Fountain of Youth

Law firms are looking for the best ways to recruit and retain Gen Z employees.

It's a refrain that's been heard through the ages: "The new generation doesn't work as hard/isn't as motivated as [insert generation here]." In fact, a recent survey showed that 74% of managers and business leaders feel that Generation Z is the hardest generation to work with for reasons such as lack of technological skills, lack of communication or being easily offended.

On its face, this statistic offers an indictment of the working culture among young people, specifically Gen Zers — those born between 1997 and 2012. But upon a closer look, one central question is raised: Is Gen Z really that difficult to work with? Or is that just a perception that can easily be changed with a little bit of time and effort?

In full disclosure, your author is a member of Gen Z (albeit from the earlier end of that range), but it doesn't take firsthand knowledge to understand that during some of their most formative years, today's youngest employees lived through a sea change in how work is conducted.

Because of the pandemic, my entire senior year of college was held online, along with my college internship. I won't sugarcoat it: It sucked. Not being able to hang out with people or participate in social activities ripped away a crucial part of the college experience.

Gen Zer Olivia Thompson, Accounts Payable Clerk at Obermayer Rebmann Maxwell & Hippel LLP, recalls how COVID deprived her of the chance to learn skills that are necessary for the workforce. "Interpersonal skills kind of suffered because when we start learning certain skills in high school — such as public speaking — that's when the pandemic hit for most of us," she says.

But that period also provided proof that a lot of work can really be done from anywhere, which sets up a push back to the "norms" of a prepandemic working environment that firms find themselves dealing with now. If employees can be just as productive — if not more so — by working in a self-contained environment, why should they be forced into an office five days a week?

> "I think every generation has gotten less and less tolerant of employers being rude, not understanding, and [not] having respect for their own time and who they are as a person. We're not robots, and I think that's what Gen Z wants people to know."

> "But contrary to the perception of those managers mentioned earlier, Gen Z employees are more than just people who get offended at a perceived slight and talk in slang all the time (trust me, even I have no idea what half those words mean. Skibidi? Beats me.)"

DESIGNING FOR THE FUTURE

Many legal organizations are addressing that question by first looking at their office design. With hybrid work not going away, it behooves firms to facilitate that method, especially for younger employees who are well-adapted to it.

One prevailing theory, according to Art Bloodworth, Workplace Design Leader at DLR Group, is that offices should marry the convenience and connectivity of the home with the collaboration inherent to in-person work. "Maybe we rethink how we allocate real estate to do more collaborative or engaging spaces where [young employees] could team together or with senior leaders," he says.

In practice, some firms have created cafe-type spaces where colleagues can connect in a less formal environment, such as in booths or nooks that allow for one-on-one conversations while still being part of a social atmosphere. Less priority is placed on having private offices, although there are still spots where attorneys and staff can go to have quiet time or private meetings.

Even larger meeting rooms can be modified to accommodate the new approach to working. "I don't have to be in a desk chair," says Bloodworth. "I could be on a sectional that you can sit on for an hour-long meeting and not be uncomfortable. People flock to those meeting environments."

One key aspect of any space — casual or formal, social or private — is that it must have full tech capabilities, such as outlets and strong Wi-Fi. "[Gen Z] has just grown up with the connectivity and technology that we're using right now. Part of the design is that all of these areas are set up with the connectivity that they expect," Bloodworth says.

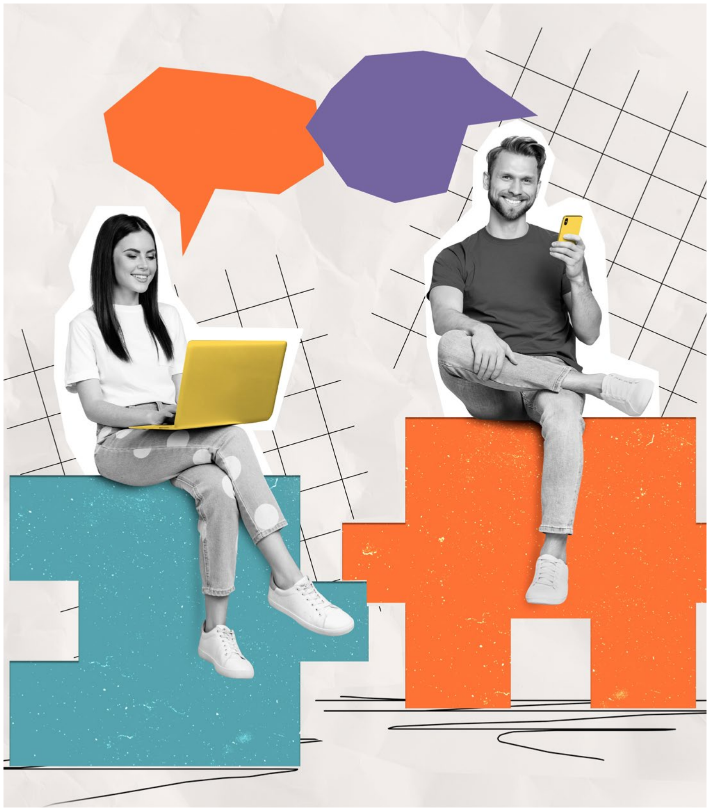
Bloodworth adds that it's not just the physical space that's important — it's also the thought and meaning behind it. "I think young lawyers appreciate the comfort and meaning in their space [through] design elements, materiality, sourcing and reflections of the actual community that you work with," he says.

That means doing more than just putting accolades on the wall. Firm leaders should be mindful of what story they're trying to tell: Does your firm seek justice for those wrongfully accused? Do you support minority-owned businesses whenever possible? These are just two examples but are indicative of the attributes you'll want to emphasize when recruiting younger talent.

EMPHASIZING RESPECT AND COMMUNICATION

While office design is an integral part of modernizing the work environment, there are several other factors that contribute to the success of young employees.

First, managerial style can play an outsize role in how comfortable a new employee is at their organization. A recent Atlanta Business Chronicle article revealed that around 20% of recent college graduates prefer being micromanaged, 25% prefer a hands-off approach, while a slight majority prefer a mix of the two. This shows there is no one-size-fits-all solution to working with Gen Z, and it's important to establish your employee's preference at the outset.



"I would say honoring the job responsibilities is a really big thing to me. I had a contract I signed for what I would be doing at the firm, and that has been followed...an important part is not adding to people's workloads with jobs they did not expect to have."

Thompson says she appreciated having more freedom when she started at her firm. "I love how you are in charge of yourself," she says. "I was expecting for my boss to be over top of me, giving me permission for things, but it wasn't like that at all."

Regardless of managerial style, constant communication and feedback are also key. Younger employees want to know what they're doing well and where they can improve. Establishing a culture of feedback can reap benefits for not only new additions, but also employees at all levels, ensuring everyone across the organization feels comfortable sharing their successes and challenges.

There's also no need to be afraid that Gen Zers will be offended by the feedback you give (provided the criticism is constructive and not malicious). But it's important that the conversation be meaningful and considers the perspectives of all involved. Gone are the days when saying, "Here's what you did wrong. Fix it," is an acceptable form of feedback. Today, conversations should be geared more toward helping the employee understand how to improve and helping the manager understand how to help them do so.

Thompson says listening to what a younger employee needs is the best way to make them successful in their role. "I know I come to [my boss] with my own struggles in the office, just being so young and not knowing a lot," she says.

Having grown up with the internet, Gen Zers are also adept at filtering out falsehoods or misleading information, so honesty is necessary, whether regarding behavior expectations, job descriptions or any other aspect of their job. "Wading through information and identifying important versus trivial, more true versus less true, is a necessary survival skill, and their BS barometer may be more highly calibrated in some ways," says Jill M. O'Connell, SHRM-SCP, SPHR, Human Resources Director at Paule Camazine & Blumenthal, PC, and a member of the Gateway Chapter.

Speaking of job descriptions, Thompson says the job posting was what initially attracted her to her current role. It made clear that the firm was looking for an entry-level employee and showed where there were potential growth opportunities. Looking back, Thompson says she appreciates how the description still accurately reflects her current responsibilities.

"I would say honoring the job responsibilities is a really big thing to me," Thompson says. "I had a contract I signed for what I would be doing at the firm, and that has been followed...an important part is not adding to people's workloads with jobs they did not expect to have."

Lastly, flexibility remains the name of the game for recruitment and retention, especially for Gen Z. Thompson operates on a hybrid schedule, where she works in the office three days per week and remote two days. She says the hybrid arrangement has offered a good transition period as she acclimates to the workforce, calling it a "phenomenal perk."

"There are obviously perks of being in office as well, but for my generation, probably hybrid is best at first, just because you're getting used to what a professional environment is like," Thompson says. She adds that at this point, she would not be open to a fully in-person schedule.

UNDERSTANDING GEN Z

Let's revisit our central question: Is Gen Z really that difficult to work with, or is that just a perception that can easily be changed with a little bit of time and effort?

Like every generation that entered the workforce before it, Gen Z may encounter growing pains as it introduces itself to the working world. These pains have only been exacerbated by the pandemic as normal learning and life experiences were severely interrupted.

But contrary to the perception of those managers mentioned earlier, Gen Z employees are more than just people who get offended at a perceived slight and talk in slang all the time (trust me, even I have no idea what half those words mean. Skibidi? Beats me.)

Gen Zers are truly interested in being the best employees they can be — they just may need a little help along the way. By creating an environment where they can succeed, along with accommodating the managerial style they feel most comfortable with, employers can help their younger workers reach their full potential.

"Things aren't as they used to be," Thompson says. "I think every generation has gotten less and less tolerant of employers being rude, not understanding, and [not] having respect for their own time and who they are as a person. We're not robots, and I think that's what Gen Z wants people to know."

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3 Signs You Don't Have a Psychologically Safe Work Environment (and How You Can Create One)

WENDY MCCLELLAN
Founder
Structure for Success

Psychological safety plays a significant role in helping employees feel valued and appreciated, resulting in a thriving and productive workplace.

How many of us have experienced this? That horrible feeling in your gut every time you walk into the office. The Sunday blues where the thought of going to work makes you burst into tears or physically ill. The boss who makes you feel stupid and like you're never good enough. You want to call in sick, but you don't dare use your hard-earned leave because it will come back to haunt you.

In short, you don't feel psychologically safe in your job.

Oh, no, what are the Gen Zers whining about now? I can hear you thinking.

But not so fast. Harvard professor Amy Edmondson introduced the concept of psychological safety in the workplace in 1999, when the first cohort of Zers were infants. In fact, Edmondson's studies found that psychological safety significantly impacts an organization's productivity. When employees experience psychological safety, she found, they are more engaged, more satisfied and more loyal. They feel more secure, supported and valued. By creating psychologically safe workplaces, organizations go a long way toward developing a motivated, dedicated and productive workforce.

> "The nontangible aspects of psychological safety are scary to employees and leaders and can cause stress. Leaders can't address psychological safety if they don't understand it."

Unfortunately, many workers believe psychological safety is a fantasy, and many employers argue that it's soft-skill nonsense. Joyce Patrick-Bai, Executive Director for the IP firm

Schmeiser, Olsen & Watts, maintains that both groups are baffled, because the concept of psychological safety is not well understood.

"The nontangible aspects of psychological safety are scary to employees and leaders and can cause stress. Leaders can't address psychological safety if they don't understand it," says Patrick-Bai. Without knowing it, both groups are creating the opposite: a psychologically unsafe workplace.

What does a psychologically unsafe workplace look like? It doesn't have to be blatantly toxic. If your workplace exhibits any of the following, it may be psychologically unsafe.

1. Workers Are Afraid to Use Their Leave

The United States is one of the few countries that doesn't mandate paid sick leave for all workers by federal law. Vacation time is not a federal requirement either, nor is parental leave for small businesses. Only companies with more than 49 employees are required to offer parental leave.

Still, according to the U.S. Bureau of Labor Statistics, 78% of the private sector workforce is offered paid sick time. According to a 2023 Pew Research survey, however, fewer than half use their time off.

I interviewed 10 employees in the Phoenix area who requested anonymity. All agreed they rarely use sick time unless absolutely necessary. Meanwhile, they reserve vacation leave for family trips, not to decompress. Indeed, all 10 employees admitted to stress, fear and guilt when taking time off. When I asked about parental leave, 100% of the interviewees said they fear being judged, penalized or discriminated against if they use those benefits.

Creating an office where employees are not afraid to ask for what they need (and have earned!) is a great way to introduce psychological safety into your culture.

"Businesses need to create a business culture that makes it easy for employees to use their paid time off," says Patrick-Bai. To encourage employees to take leave, she created a user-friendly system for requesting time off.

Her system is simple. "The time-off calendar is visible to everyone. To request time-off, employees simply fill out a form and submit it." With this nonconfrontational format, employees are more apt to take leave. "Employees come back refreshed, which benefits everyone involved."

Andi Paus, Partner at Arizona Mediation Institute in Phoenix, monitors her employees' time off banks. If she notices they haven't taken time off in a while, she encourages them to do so. "A long weekend can do a lot to refresh someone's mind, attitude and work ethic. It doesn't need to be a long vacation. An extra day gives them the breathing room to come back stronger than ever," says Paus.

Patrick-Bai agrees but notes that her high-performing employees don't want anyone else to touch their workload and for this reason, refuse time off. Instead of forcing a single long patch of time off, Patrick-Bai suggests that they, for example, take every Friday off for a month. "Be creative in how to get your high-producing people to take PTO. You can see when they are in high gear for too long. Everyone needs a break."

2. Perfection Is Expected, Mistakes Not Tolerated

When a firm demands perfection of employees, the organization becomes less productive, not more. Demanding perfection creates a culture of blame rather than accountability. Employees spend more time double-checking their work, they struggle to delegate lest they get blamed for others' mistakes, and they procrastinate — after all, if you don't start a task, you can't do it wrong.

Research has shown that expectations of perfection cause job dissatisfaction, depression and burnout. No one likes to make mistakes. When you make a mistake in an unsafe workplace, you feel embarrassed and uncomfortable, even ashamed. You may try to hide your mistakes. This costs the company money and erodes trust among employees, customers and leaders.

> "Create a culture of accountability rather than blame. Encourage employees to acknowledge, apologize for and correct mistakes. It's a change in mindset."

The truth is everyone makes mistakes; no one is perfect. Striving for perfection is a losing game. According to a study in 2021, employees on average make more than 100 mistakes at work per year. Stuff happens, from easy fixes like forgetting to attach a document to an email to larger ones like forgetting to schedule an important client meeting. It's not really the mistakes that matter, though, or the number of them. What matters is how the company and employee address them.

Create a culture of accountability rather than blame. Encourage employees to acknowledge, apologize for and correct mistakes. It's a change in mindset. Acknowledge that mistakes are necessary for learning and help us grow as an employee and a firm. When employees feel psychologically safe enough to own their mistakes and brainstorm solutions, they will be more motivated and productive.

"Mistakes happen; that is life," says Patrick-Bai. "I want people to come to me with a mistake or bad news. Even if you aren't sure, something just doesn't look right, bring it up. Knowledge is power, for both of us."

"As a leader, it is important for me to set an example," says Paus. "If it's my mistake, I acknowledge it. One time my paralegal told a client a scheduling error was the paralegal's fault. I told her not to do that. I made the error, I own it. I don't expect her to cover for me."

As a leader in a psychologically safe environment, the way you act when your employees mess up is important. Don't blame and don't assume. Be curious and ask questions. Seek a novel solution. Is it a structural issue rather than human error? Maybe a new policy or procedure is required. Or maybe it's a sign this employee's workload is too heavy.

And know that you don't have to fix everything. Give employees the room and tools to fix the mistake themselves. By fixing their own mistakes, employees build problem-solving skills, grow more confident and expand their knowledge. Coach them to seek excellence, not perfection.

3. Workers Are Afraid to Speak Up

In today's workplace, collaboration and teamwork are the foundation for successful and productive teams. Psychological safety plays a critical role in cultivating great teamwork.

Workers who don't feel safe are afraid to speak up. They don't trust that leadership will respect their input and may even berate them for it. The opposite is often true as well in an unsafe workplace — leaders don't trust their teams with transparency about important things like goals, expectations and processes. Not giving team members a voice and not communicating clear expectations are sure-fire ways to stop teamwork in its tracks. Without transparency, the team is working in the dark.

"Because we are a mediation firm, communication is critical," says Paus. She attributes much of their success as a firm to creating a team where everyone's voice is equal, and no one is afraid to question the leaders. "My paralegal feels open enough to say, 'This isn't how we originally planned to do this'," Paus continues. "I admit to changing my mind and apologize for not telling her ahead of time."

Laying out clear expectations while allowing employees to ask "why" creates a sense of belonging and cohesion that drives productivity. When employees feel their contributions matter, they are more likely to work together and take ownership of common goals and company initiatives. And they are more likely to do so when they feel psychologically safe.

CREATING A PSYCHOLOGICALLY SAFE WORKPLACE

As a leader, you hold people accountable for their performance metrics, but that's not all. To drive true performance, you must establish a psychologically safe workplace that encourages trust and creative collaboration and doesn't shame mistakes. When workers feel safe to fail constructively, they will do astounding things. To create such a psychologically safe environment, leaders must establish and communicate the shared belief that the organization is open to risk-taking, out-of-the-box thinking and constructive mistake making.

> "Employee engagement and job satisfaction are critical to organizational success and employee well-being and retention. If employees feel safe, valued and appreciated, they will stay with the firm."

Here are four ways to create psychological safety for your team and the larger organization:

1. **Ask open-ended questions (without yes-no answers)** to get your team members thinking. Allow them to disagree and actively dig deeper into their thoughts and work through solutions out loud.
2. **Show value and appreciation for everyone's thoughts.** There is no such thing as a stupid idea or question. That doesn't mean you have to implement everything team members suggest, but with this freedom, they may come up with a gem you hadn't thought of.
3. **Respect everyone.** Team safety comes not just from the leader but also from the other members of the team. Coach your team that there is no eye-rolling, sighing or snorting when someone suggests a new way of doing things. No "of course" comments under someone's breath when someone admits to messing up. And no talking over each other. Everyone's voice is important.
4. **Be precise with information, expectation and commitments.** Be crystal clear about your team's goals and duties, as well as best practices for achieving them.

Leaders can promote psychological safety in their own teams, but such initiatives are always more effective coming from the top. Employee engagement and job satisfaction are critical to organizational success and employee well-being and retention. If employees feel safe, valued and appreciated, they will stay with the firm. Psychological safety plays a significant role in elevating these principles and creating a thriving and productive workplace.

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Wendy McClellan is the Founder of Structure for Success, an HR consulting firm working with businesses without an internal HR team to assist them with hiring and employee support services. Her forte is working with leaders who want to elevate their company's profitability and efficiency. McClellan has been in leadership roles for over 30 years and has taken her corporate knowledge and turned it into a resource for small business owners.

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4 Legal Growth Strategies to Improve Your Customer Service

BRUCE POLICKY
Director of Sales
Tabs3 Software

A law firm has one opportunity to impress a potential client. Whether the person searched for a lawyer online and found your website, received an email from your mailing list forwarded by a friend or discovered your firm on social media, one click is all it takes to win or lose a new client.

If leads aren't converting as you envisioned, you need to revisit marketing strategies and implement robust legal growth tools.

Each strategy below aims to improve trust and attract the right type of client for your firm. Over time, these tools will help you land more clients with less work and fuel your firm's growth. Change doesn't happen overnight, but you can improve lead generation and grow your firm with these four strategies.

1. Develop a high-quality legal website.

A law firm's website must be professional in appearance and functionality and provide content specific to its practice areas. Work with website designers and developers who understand the needs of a legal audience and the compliance rules for legal writing.

When considering design, simpler is better. If a client can't figure out how to navigate your website, or it's too busy, they're more likely to leave the site and seek out one of your competitors.

"When considering design, simpler is better. If a client can't figure out how to navigate your website, or it's too busy, they're more likely to leave the site and seek out one of your competitors."

In general, legal websites should include:

- User experience-centered (UX) design that's easy to navigate.
- Helpful content pages that answer user questions and showcase your expertise.
- Clear call-to-action (CTA) buttons that invite the website visitor to take action.
- A design optimized for desktop, mobile and tablet users.
- Contact information easily accessible on the home page.

Additionally, your website should deliver relevant content for your audience. This might include helpful FAQs related to services, blog posts that offer unique insights and practice area pages that outline your law firm's expertise, building trust that you're the best attorney for the client's case.

2. Leverage helpful website content with SEO keywords.

When searching on Google, 39.8% of people click on the first organic result. The higher your website ranks organically — meaning not relying on paid ads — the more trustworthy your law firm will appear to visitors.

Improve your search rankings by strategically incorporating search engine optimization (SEO) keywords in your content. These keywords make it easier for potential clients to find your firm. However, SEO keywords must be relevant to both your law firm and your leads. Always consider keyword intent. An SEO best practice is to build keywords and content around the common types of questions users are asking.

For example, a personal injury law firm in California might incorporate a long-tail keyword such as "work injury legal options California." This search would most likely be conducted by someone who was injured on the job and doesn't know their options, an ideal visitor for personal injury and worker's compensation attorneys.

3. Build intake tools into your website.

Putting intake forms on your website allows clients to kick-start the process of working with your firm. However, there are numerous steps involved, from qualifying leads to following up for consultations.

An online form reduces the effort involved with intake by:

- Facilitating quick lead qualification with smart forms tailored to your practice areas.
- Capturing contact information and connecting it with your legal client relationship management (CRM) software to initiate follow-ups.
- Simplifying workflows by keeping all relevant information within your practice management system.

4. Encourage follow-ups with your CRM's automated response features.

CRM software offers streamlined tools to collect information and follow up. Automated response tools such as email and text messages mean potential customers receive an immediate answer, allowing your firm to increase your touches and stay top of mind.

Not all CRMs are the same. It's important to know what to look for. When evaluating whether a specific CRM will meet your firm's needs, make sure that it has features like:

- Automatic text and emails to foster good relationships with potential clients.
- Video messaging to deliver more personalized communication.
- Automated meeting reminders to reduce no-shows for consultations and appointments.
- Drip email campaigns to share quality content with leads, current clients and referral partners.

A robust legal CRM system and a high-quality website streamline lead generation with automated responses, personalized messaging and efficient intake processes. Together, they enhance client engagement and trust, helping your firm build stronger relationships and drive growth.

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Bruce Policky is the Director of Sales at Tabs3 Software. He is responsible for managing all sales and training activities. Over his 30+ years with the company, he has served in the roles of client success manager, quality assurance manager, technical support supervisor, systems trainer, product manager, and director of enterprise sales and success, helping clients and consultants in the legal software industry meet their billing, accounting, practice management, electronic payment, CRM and website needs.

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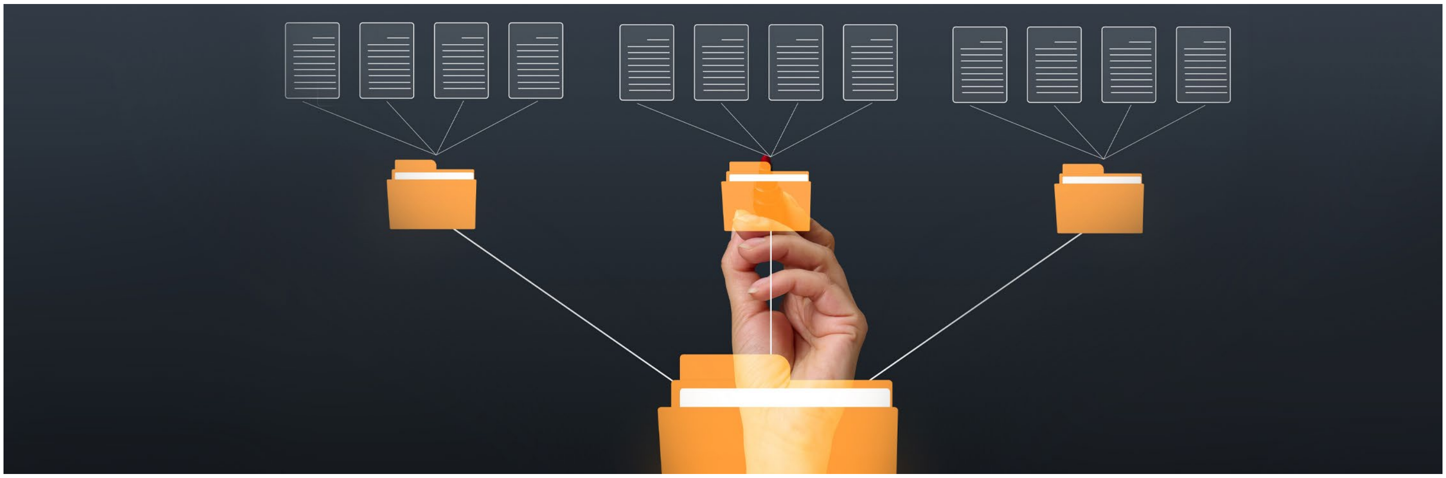

VY TRAN
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Simplifying Document Retrieval Processes in Law Firms

In the fast-paced legal environment, the efficient organization and retrieval of documents is critical to a law firm's success.

Legal professionals often grapple with large volumes of documentation, and the administrative burden of managing these files can be overwhelming. Streamlining these processes not only saves time but also boosts productivity and reduces operational costs.

> "The top priority for implementing a DMS is not purely finding an efficient system but one that manages the industry's complexities."

CHALLENGES IN DOCUMENT RETRIEVAL

Legal practices generate an enormous amount of documentation daily — from client contracts and case files to court submissions and internal memos. The sheer volume makes it difficult to manage these documents effectively. Some of the primary challenges include:

- Managing different document types.
- Paper-based versus digitized documents.
- Documents that are stored in different formats.
- Documents in different locations.
- Cost of sifting through massive data volumes.

With clients expecting fast results while adhering to a strict timeline, something as routine as retrieving documents could be the difference maker.

Moreover, your chosen legal technology may impact compliance with regulations like the Federal Trade Commission Act and the ABA Model Rules of Professional Conduct. Law firms must consider efficiency and compliance, which is a tricky balancing act.

STRATEGIES FOR EFFICIENT DOCUMENT ORGANIZATION

Document organization can take many forms. Ideally, firms should give themselves multiple options for organizing their legal documents from a central interface, including by:

- Case
- Client
- Case type
- Date
- Outcome
- Status

For example, the following structure could be used for historical filings:

CLIENT NAME

- Case: Attorney notes and research, correspondence, trial prep, and pleadings
- Administration/Billing

IMPLEMENTING EFFICIENT RETRIEVAL SYSTEMS

Document management systems (DMSs) are nonnegotiable for law firms due to the sensitive nature of the information legal management professionals hold. DMSs are designed to organize these documents systematically while providing secure storage and ironclad access control. Some of the key features to think about when opting for a retrieval system include:

- Industry compliance
- Collaboration features
- Search and retrieval capabilities
- Metadata tagging
- Version control
- Document history

Naturally, every law firm has its preferences regarding document organization. That's why ensuring that any solution meets document retrieval best practices is essential.

DEVELOP A CLEAR FILING STRUCTURE

Create a consistent and logical filing structure that all staff members adhere to. This should include:

- **Hierarchical Folders:** Organize documents into hierarchical folders based on categories such as case type, client name or practice area.
- **Standardized Naming Conventions:** Use standardized naming conventions for files to make them easily identifiable.
- **Retention Policies:** Establish clear retention policies to manage the lifecycle of documents and ensure outdated files are archived or deleted as necessary.

LEVERAGE ADVANCED SEARCH CAPABILITIES

Enhance your DMS with advanced search capabilities, such as:

- **Boolean Searches:** Use Boolean operators (and, or, not) to refine search queries
- **Full-Text Search:** Implement full-text search functionality to locate specific terms within documents.
- **Faceted Search:** Utilize faceted search to filter results by categories such as date, author or document type.

BEST PRACTICES FOR DOCUMENT RETRIEVAL

The legal industry's document retrieval needs differ from others because of tighter data protection regulations. So what do best practices look like from a legal perspective? Here are some tips to get started:

- Standardize your naming conventions.
- Utilize metadata tagging to add context to documents.
- Ensure your DMS includes full-text search capabilities.
- Use a logical taxonomy.
- Provide clear labeling for different versions.
- Implement document profiling to classify documents based on issues like content and relevance.
- Ensure robust access controls are in place.
- Establish a regular audit schedule.

However, none of these best practices remain effective if staff are not adequately trained in how your DMS works. Legal technology must come with a defined training schedule to prevent costly mishaps later.

WHAT EFFICIENT DOCUMENT RETRIEVAL LOOKS LIKE IN PRACTICE

Discussing DMSs often involves the abstract, but what does it look like when implemented in the field?

One law firm recently wanted to optimize how it retrieves documents and complaints to improve efficiency. They wanted their retrieval system to provide specific information to the relevant attorney.

The firm implemented its automated ticketing system from a well-known provider to track, prioritize and allocate its requests. This eliminated the manual retrieval process and enabled full cross-platform functionality with its other solutions. The new retrieval system not only delivered efficiencies but also connected disparate systems to enable its systems to work together with zero hassle.

This is just one example of how DMSs can be implemented within an existing ecosystem without forcing firms to transform their legal technology completely.

The top priority for implementing a DMS is not purely finding an efficient system but one that manages the industry's complexities. Legal organizations must consider the compliance issues associated with document storage, management and retrieval, including information management and governance.

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Vy Tran is the Marketing Manager at Corodata, where she is dedicated to telling the story of how the company helps businesses protect what matters most: their information. Every day, Tran works to create strategies that not only highlight the value of Corodata's records management and data protection services but also demonstrate how the company makes life easier for its clients. The goal is to ensure that clients feel confident, secure and supported.

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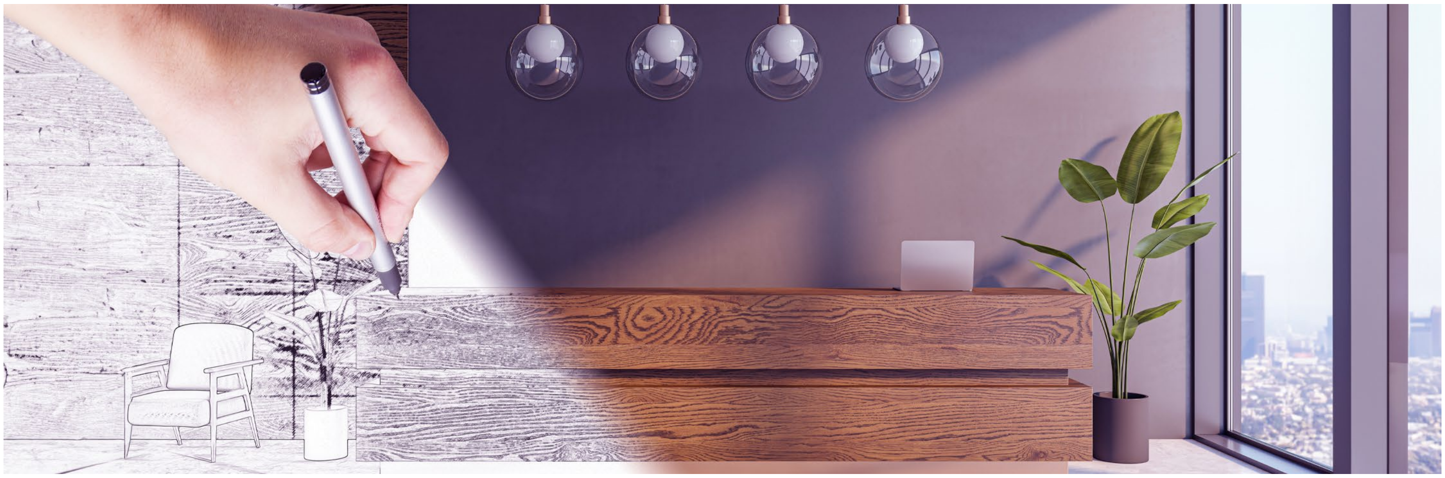

AMALIA MOHR
Principal and Senior Interior Designer
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How to Design a Law Office That Promotes Employee Wellness

The legal industry is a high-stress profession where stress and burnout are endemic. Architects and interior designers working in the legal space must find ways to create post-pandemic workplaces that are calming and take the importance of employee mental well-being into account while creating spaces for collaboration, productivity and efficiency. One approach to contemporary workplace design applies wellness principles that are expressed through lighting, color and curated art; spacious circulation and amenity spaces; access to natural daylight, fresh air and views; and the prominence of lush indoor plants and beautiful, natural materials.

> "The design challenge for this new era is to create the optimal environment for the hybrid worker, ensuring that their needs are met and that they get the most out of the office environment when working in person."

This approach also reflects the realities of hybrid work and responds to the needs of an increasingly hybrid modern workforce. Offices designed for exclusive in-person work are no longer being used in that way. The design challenge for this new era is to create the optimal environment for the hybrid worker, ensuring that their needs are met and that they get the most out of the office environment when working in person.

An example that highlights these principles is the redesign of national law firm Davis Wright Tremaine's (DWT) office in Portland, Oregon. LRS Architects designed a future-forward law office to fully support the local hybrid workforce, as health and wellness is one of their core principles

When DWT approached us with the notion of consolidating their Portland operations into a smaller space, we envisioned a path forward in which DWT's offices — previously taking up more than three floors at another Portland site — could be combined in one reimagined floor at the downtown Ritz Carlton. The design incorporates biophilia, bringing natural materials and elements into the interiors and providing access to the outdoors. Even on the seventh floor of a downtown tower, employees have integrated access to a serene outdoor space.

Outdoor interaction zones are available for staff and visitors to get away from their desks and enjoy some cool Oregon air in conversation with clients and coworkers. These outdoor interaction zones also effectively create even more usable office space and can serve as overflow and host larger gatherings.

Combined with indoor plants and carefully curated artwork, these design elements create a sense of calm. Taking even a moment to enjoy room-length views of Mount Hood, to go outside for a breath of fresh air, or to touch the carefully maintained indoor plant life can all help reduce stress.

DWT, which had occupied its previous space for several decades, wanted to stay in central Portland while simultaneously downsizing its office footprint — again, in line with the post-pandemic hybrid working model that has become so popular. DWT envisioned its new offices as a place that their team wanted to be in to interact with their colleagues and clients.

The new design encourages connectivity, efficiency and interactive productivity. This more intimate space is meant to stimulate person-to-person interaction — and do so in a way that is simply impossible over virtual meeting platforms.

According to Neuroscience, in-person interaction is better not only for team projects but for individual brain stimulation as well. Certain social cues are lost on a video screen, and screens can haywire our built-in ability to recognize emotions on other people's faces. The value of face-to-face collaboration is particularly important in a field such as legal.

At DWT, it all starts with a proper greeting: The lobby welcomes employees, clients and visitors to a serene space with the calm introspection of a museum, complete with a gallery wall of curated art that explores themes of nature. The reception area is defined by sweeping curves and soft lines, from the large, circular desk to the sculptural felt screen rising through the center of the space near the curving conference room. Beyond reception, a wide conference space with room-length windows allows abundant sunlight and grants the opportunity to take in breathtaking views of Portland's skyline and surrounding mountains. The office offers lounge spaces to foster a sense of common purpose among the legal staff. Additionally, "sound masking" cuts out distracting noise without adding more walls that would close off the open-floor concept.

The overall effect is a subtle sense of opulence, sophistication and comfort in a hybrid workplace. The flexible, space-conscious, enveloping design creates a communal environment where legal professionals can feel "at home" and care for their mental health, even when away from their houses.

Learn More About Office Design with *Legal Management Talk*

Amalia Mohr joined *Legal Management Talk* to discuss how her firm approached a redesign at Ball Janik LLP by emphasizing employee wellness and hybrid work. Watch her describe how the elements they incorporated into the design — such as a lot of wood and glass — have impacted the firm, and don't miss the pictures showing off some of the sleek new office!
alanet.org/publications/legal-management-talk-podcast

ABOUT THE AUTHOR

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Anniversaries, Awards and Appointments

Members on the Move

Freeha G. Ayala, a member of the Mile High Chapter, is now Director of Administration at Bauman Loewe Witt & Maxwell, PLLC, in Scottsdale, Arizona.

Jennifer L. Cramb, a member of the Maryland Chapter, is now Director of Human Resources at Franklin & Prokopik, PC, in Baltimore, Maryland.

Lela M. Lescallette, a member of the Pittsburgh Chapter, is now Office Manager at Raines Feldman Littrell LLP in Pittsburgh, Pennsylvania.

Susan J. Rossi, a member of the Sacramento Valley Chapter, is now Office Coordinator at Stoel Rives LLP in Sacramento, California.

Lisa Schmidt (not pictured), an Independent member, is now Bookkeeper at Woods Aitken LLP in Lincoln, Nebraska.

Melissa G. Tokar, a member of the New Orleans Chapter, is now Chief Administrative Officer at Lugenbuhl Wheaton Peck Rankin & Hubbard in New Orleans, Louisiana.

Sending Our Condolences

ALA is saddened by the passing of **John Randall**, who was Office Manager at Munger, Tolles & Olson LLP in San Francisco, California. John was a member of the Golden Gate Chapter and was approaching his 20th year as an ALA member. Our thoughts are with his family, friends and colleagues.

What's Happening at Headquarters

Struggling with Succession Planning? We've Got You

The 2024 edition of ALA's *Legal Management* print magazine is hitting your mailboxes now! This year's annual print edition dives deep into a critical topic for law firms: succession planning.

Inside, you'll find insightful articles and expert advice on tips for small firms looking to succession plan, maximizing technology in succession planning and much more! But that's not all — our full edition is also available online this year! Don't miss out on these valuable insights.

Check Out Two Must-Listen Legal Industry Podcasts

ALA President Amanda Koplos, CLM, CPA, was recently featured on *The Lawyer's Edge* podcast with Elise Holtzman, JD, PCC! As the legal industry continues to evolve, technology and talent are reshaping law firm management. Amanda shares her insights on these critical shifts and how they impact work-life balance and firm operations. Tune in to hear Amanda's expert advice on navigating these changes and ensuring your firm thrives in this dynamic landscape. Whether you're a law firm leader or interested in the future of legal management, this episode is a must-listen!

While you're at it, check out the latest *Legal Management Talk* episode, too! Amid the current political and social climate, several organizations have begun to roll back their diversity, equity, inclusion and accessibility (DEIA) programs. Ann Thomas, Chief Diversity and Inclusion Officer at Stinson LLP, joins the program to discuss the state of DEIA today, how firms of different sizes should approach their DEIA initiatives, and how clients are still looking for their firms to show progress on diversity and inclusion. Tune into "Doubling Down on DEIA" today by going to *alanet.org/podcasts.*

2023 ALA Financial Statement

At ALA, we continue to work to make the most efficient and impactful use of our financial and human resources. ALA's Board of Directors and staff are continuously exploring and identifying opportunities to improve efficiencies and optimize results. In 2023, our overall revenue was $7.17 million and expenses were $7.18 million, resulting in a net loss of $14,747. Read the full statement at the link below

As we make our way through the second half of 2024, we remain focused on elevating your membership experience and refocusing our efforts to meet the challenges you face as legal management professionals: *alanet.org/legal-management/2024/september/ala-now/at-ala.*