

### Diamond Business Partner



## President's Message

*Janet G. Proudfoot, CLM*

OC-ALA Chapter President 2015-2016

### Table of Contents

<a href="#">President's Message</a>	1
<a href="#">Business Partner Spotlight, FSO</a>	3
<a href="#">ALA Celebrates 44 Years</a>	4
<a href="#">Business Partner Spotlight, WAMS</a>	5
<a href="#">Monthly Focus</a>	8
<a href="#">Administrator Spotlight</a>	10
<a href="#">Scholarship Winners</a>	11
<a href="#">HR/Labor Law Section</a>	16
<a href="#">Top 10: Legal Resource Headline</a>	17
<a href="#">OC-ALA Out &amp; About</a>	18
<a href="#">Membership</a>	20
<a href="#">Member Anniversaries</a>	21
<a href="#">New Business Partners</a>	22
<a href="#">CLM Corner</a>	23
<a href="#">Upcoming Events</a>	24

### Emerald Business Partners



Greetings, OC-ALA! Somehow, it's almost the middle of August which means summer is more than halfway over. Students are on their way back to school and the end of the year is already in sight. Not sure why the days seem to be passing so quickly but it's just a reminder to stay focused, flexible, and thankful for the good things we have in our lives.

Project SELF: what an excellent program. I cannot tell you how excited I've been for the opportunity to participate in this inspiring program during the last few years. The 2015 program, in its 20<sup>th</sup> year, is wrapping up. The annual Recognition Dinner was held on August 5 where five OC-ALA educational scholarships were awarded. A giant debt of gratitude is owed to OC-ALA Project SELF committee members Mary Lou Czermer, Lisa Smith, Dana Trevers, and Donna Williams for organizing and executing another flawless program and also to the law firms and law-related businesses sponsoring the program. Without the support of sponsoring firms the program would not exist, period. Special thanks go to Orange County Bar Foundation staff members Nancy Garcia, Genny Hornak, Martha Madrid, and Karen Ruan for their collaboration with OC-ALA on this perennially outstanding program.

The ALA National Conference in Nashville and the Chapter Leadership Institute in Grand Rapids we held in May and July, respectively. National Conference was fabulous as always not only for quality programming but for excellent musical entertainment virtually on every corner at all hours. Several OC-ALA members attended Paul Huschilt's educational session "Experience Resilience Through Change" that was among the most highly rated programs offered at the 2015 conference. OC-ALA members will have an opportunity to hear Paul locally on Tuesday, December 1, at the annual Law Firm Leaders Holiday Luncheon. The Chapter Leadership Institute's keynote presentation "Leading Through Uncertainty" by Todd Henry identified the key attributes of effective leaders during times of uncertainty.

**President's Message**—*continued from page 1*

Take a look at his blog on [www.toddhenry.com](http://www.toddhenry.com) for a few of his well-considered and articulated thoughts.

Uncertainty and change is a constant in our daily lives both at work and at home. Many years ago, prior to working in the legal field, I attended a presentation by the CEO of my company, a Fortune 500 corporation, where he said "the only constant is change" and I thought to myself "what is he talking about?" What I didn't know then but do know now is that I would spend the better part of the next 25 years learning exactly what he was talking about. Resilience is an attribute of effective leaders. Focus is another. Appreciation for the positives and things that do go right is one more. I appreciate the opportunities available to OC-ALA members that provide learning experiences on a constant basis.

Included in the program offered at the Chapter Leadership Institute was a presentation by the ALA board of directors announcing their recommended name change for the national organization: "LawVantage" with the byline "Your business of law society." More information will follow in the weeks to come and a formal vote by all chapter presidents, on behalf of their respective chapters, will occur in October. OC-ALA members will have an opportunity to cast their vote locally so that our chapter's vote will represent the collective voice of OC-ALA members. Resilience, so that we can be open to hearing what others have to say and to appreciate other points of view, will be key to educating ourselves regarding the board of directors' recommendation. In the end, whatever happens, I will focus on the fact that our organization will remain committed to its members and core values: education, networking, and the exchange of information. Our organization is made of its people, and, whatever the official name, the people are what make the organization now and will continue to do so in the future. And I appreciate that.

OC-ALA's annual Community Connection event is in the works. The month of October will feature a drive to collect professional and business casual clothing, shoes, and accessories for male and female clients of Working Wardrobes' "Vet Net" program. On Thursday, November 5, OC-ALA members and Business Partners will have an opportunity to gather together to sort through the donations and learn more about the program. More information will follow soon!

I look forward to seeing you at upcoming educational and networking events. Take a look at the chapter's calendar and plan to attend upcoming educational programs as well as the chapter's 2nd Networking Event at Newport Beach Vineyards and Winery. The annual Business Partner Appreciation event scheduled for Thursday, October 29 at 28 Restaurant in Irvine will feature fabulous food by Top Chef Shirley Chung as we celebrate and thank our 2015 Business Partners.

I hope your summer has been pleasant and I wish the best to each of you every day! If ever I can be of assistance to you please do not hesitate to contact me. 🍊



*Business Partner Spotlight*

## **FSO Outsourcing**

By Owen Frager

Mitchell D. Weiner has seen the workers out there – overlooked, ignored, forgotten in the decades- long transformation of Corporate America. They're the hourly workers who work in traditional, corporate-run catacomb-like mailrooms of the workplace. Their tasks are vital to business, yet their faces are a blur to patrons and higher-ups.

To Weiner, whether the counter or the mailroom, those who run them are critical components to the engines of an enterprise. This “forgotten demographic” is not forgotten or overlooked by Weiner. In fact, he was who they are.

Weiner is the unabashed Founder, Owner and Chief Happiness Officer with FSO. The award-winning, enterprise-wide onsite outsourcing and people solutions company, headquartered in New York City, services a multitude of clients across the nation. FSO provides Front Of House, Conference & Hotelling Services, Call Center Services, Facilities Management, MPS & Device Management, Reprographic Services, Mail & Logistics Services, Messenger Services, Records Management Solutions, Legal Solutions and Information Technology. Today, the company employs 2,400 folks nationwide. Most have earned effusive kudos from Weiner's clients.

Recognized on the Inc. 5000 list of the nation's fastest growing companies for the third consecutive year, FSO's growth and success can be attributed to making a positive and powerful impact on their clients' bottom lines, as well as their employees' careers and lives.

FSO is in the business of Onsite outsourcing, the practice of hiring Subject Matter Experts to manage on your behalf, the people, processes, and technology associated with non-core business functions.

The business benefits are plentiful, and most simply stated; “this business model allows companies and firms to focus on their core, revenue-generating activities.” Outsourcing isn't just about saving costs, it provides resources and capabilities many companies do not possess.

Taking care of clients and always doing more to assist is where hospitality sets FSO apart. Their Company Culture (PERSONAL, PASSIONATE AND PRODUCTIVE) ensures their staff provides a better service experience to our clients and in turn, they provide a warm and highly inspirational environment for their valued employees.

At FSO, employees are expected to always seek new ways to make our client's life better – the white glove treatment, the whole FSO Experience. It is not just a tagline for their brand – rather, it is the way they approach everything they do.

Said a large New York City based law firm who, like all of Weiner's hundreds of clients, used to outsource with a competitor, “They are very positive and incredibly helpful, considerate and kind. I was seriously

[\*\*FSO\*\*](#) —continued on page 4

blown away at the lack of care our former partner showed from the haphazard way they maintained the space and cleanliness, to how they failed to provide any process improvement or innovation. It's like FSO came in with night vision goggles and looked at every aspect of our back office (re)IMAGINED and rebuilt it from the ground up. The hospitality, articulation, knowledge and pride these folks take in their jobs is second to none."

That's the essence of Weiner's business plan: Always improve the customer's business – no matter what; always take care of his people, through better incentives, training and career pathing; and always save the customer money. For FSO itself, the model isn't about goals; it's about results. 🍊

## ALA is celebrating its 44th Anniversary in 2015!

To mark the occasion and in response to requests for a midyear campaign similar to the \$99 campaign conducted at this time last year a new member campaign "Add One More for \$44" has been launched. Every new member who joins ALA online will receive a unique code that can be passed on to a second new member who can join online for only \$44 for the remainder of the current 2015 year. As with all mid-year memberships, this membership will be renewable on January 1, 2016 at the prevailing annual rate for regular members. The "Add One More for \$44" campaign will run online through October 31, 2015.

This is a great opportunity to encourage new potential members within a firm or employer organization to take the plunge and align with ALA. Both new members will of course be eligible for members-only savings on all Fall educational events, too! New members can also take advantage of the "buddy system" so they know at least one person when they attend chapter events for the first time. New members may also appreciate this easy-to-support first year dues cost.

**How it works:** Each new member who joins online will receive an email message explaining the opportunity and providing the "Add One More for \$44" unique, one-time code. The code can be shared with the second member who will enter the code on the final payment screen during the online joining process.

For more information, contact Gabrielle Fischer, OC-ALA Director of Membership at [gfischer@allenmatkins.com](mailto:gfischer@allenmatkins.com)

### Gold Business Partners



BillQuick



CITY NATIONAL BANK  
The way up.®

NATIONWIDE  
LEGAL  
LLC

UnionBank®

USLEGAL  
SUPPORT  
The Power of Commitment™





*Celebrating 40 Years of Providing Exceptional IT Support and Solutions!*

*Business Partner Spotlight*

**WAMS**

By Allison Foelber

There has been a lot going on here at WAMS for the past few months, and we're excited to share it with the OC-ALA membership! To fill us in on what's been going on at WAMS, I decided to sit down with General Manager, Kevin Haight (who really needs no introduction to the group).

**Allison Foelber (AF):** Wow! Can you believe we're already into August, Kevin? It seems like we just started the year and already we're entering the Southern CA fall, or what we all know it as – Indian Summer. Can you fill the OC-ALA in with some of the bigger things that went on with us?

**Kevin Haight (KH):** It has been a crazy 2015, and we started out the year with an office move, which as any administrator will tell you is crazy! But we've settled into our new space and continuing work as usual, servicing our clients and providing awesome IT support to them. We built out a NOC (Network Operations Center) where our Remote Services Team handles all the server monitoring. Wall mounted monitors display various metrics that enables the team to very quickly and proactively address issues that arise before affecting the users.

**AF:** Tell me about it. I'm still trying to remember not to drive to the old office building in the morning...

**H:** Yes, but it's just around the corner from our former office, so you can't get too lost. But anyways, one of the more exiting recent things that our team is proud of is that WAMS was named to two very prestigious and impressive "top" lists this year! In late February, we were placed on [The Channel Company's Top Pioneer 500 list](#) for IT companies, and later in the year, we were ranked #108 in the entire world by [MSPmentor](#) on a distinguished list and report identifying the world's top 501 managed service providers (MSPs). And it's even more of an honor since we are one of the few on the entire list that focus primarily on servicing law firms.

**AF:** That was exciting! I know our whole team was proud. What do you think were some of the driving forces behind what got us on these prestigious lists?

**KH:** Well, first of all, our clients and friends. We truly wouldn't be in business without them, and we have to thank them first and foremost. Secondly, it would be because of our team. We are all so passionate about providing the absolute best IT support that we can to our clients, and I believe it's evident in the results that we achieve for our clients and the amazing feedback we get. And finally, our Cloud Computing solution, WAMS Cloud Connect, really enabled us to grow more than we ever thought.

**AF:** I know most of the members know about Cloud Computing, but what is it that makes our solution so different compared to others?

[WAMS](#)—continued on page 6

**KH:** The number one thing that makes our solution completely different than any other out there is that we built it specifically for law firms and have numerous law firm clients on our cloud platform that can testify to just how fantastic it works for the firm. There's not many IT companies out there that have testimonials and references behind their claims about how their Cloud Computing solution truly transforms IT for the firm, and we do. Law firms are embracing cloud services more and more, and seeking solutions that increase efficiency and make them more productive.

**AF:** What do you mean when you say that it "transforms IT for the firm?"

**KH:** Not only does it make IT a predictable, monthly, scalable, operating expense, but it allows you to access your entire IT network from anywhere and on any device. All you need is an Internet connection and a browser, and you can log into your Cloud Connect desktop to get every thing you need. Your email, applications, data, files/folders, everything is there on a Windows 7 themed desktop. The difference is that all of the computing power is done in our highly secure datacenters and not on the servers in your office.

**AF:** So just to clarify, most Cloud clients have no more servers in their office?

**KH:** That's correct. We usually keep a domain controller onsite in the office, but everything else is moved to the Cloud. So essentially, you will never have to do a Network Upgrade again if you go to Cloud Connect.

**AF:** That's one big project administrators can cross off their lists forever!

**KH:** Yes, but moving offices on the other hand... Unfortunately, I think those will still be around for a while.

**AF:** Probably. Good thing I've got maps on my iPhone. Well, thanks for a few minutes of your time, Kevin, and we both look forward to seeing you all at an OC-ALA event soon!

Are you interesting in learning more about WAMS Cloud Connect? Please contact us for a complimentary, no obligation Cloud Readiness Assessment that will give you an overall look at what state your network currently is at, what it would look like in the Cloud, and a customized roadmap and quote for how to get there. You can also fill out the form online [here](#) to request your Cloud Readiness Assessment.

## About WAMS

WAMS, Inc. has been providing law firms and businesses with comprehensive, high-quality IT/computer consulting and support solutions since 1974. Our legacy of superior quality and service continues today as we design, install and maintain a vast network of both on-site and cloud based computer systems specifically tailored for each unique law firm, legal department and business client. Learn more at [www.wamsinc.com](http://www.wamsinc.com).



## LAW FIRM MANAGEMENT ESSENTIALS

Formerly Essential Competencies for Legal Administrators (ECLA)

September 16–18 • Godfrey Hotel, Chicago, IL

### GET UP TO SPEED AND BUILD YOUR NETWORK

*Law Firm Management Essentials is a must-attend for new legal professionals.*

Have you been in an administrative or functional role in a law firm or legal department for five years or less? Do you want to grow your industry knowledge – *fast*?

Join us September 16-18 at the Godfrey Hotel in Chicago for the opportunity to build a strong network of peers, and three days of educational sessions led by seasoned industry experts:



FINANCIAL MANAGEMENT



PRINCIPLES OF LAW OFFICE MANAGEMENT



THE ADMINISTRATOR AS LEADER



OPERATIONS & TECHNOLOGY MANAGEMENT



HUMAN RESOURCES MANAGEMENT

**CLM credit available!**

### FACULTY



**Judith Hissong, CLM**  
President of Nesso Strategies



**Rachel Schaming**  
Director of Human Resources,  
Corporate Coach at Radiology Ltd.



**Ronald Seigneur,**  
CPA/ABV/CFF, ASA,  
CGMA, CVA  
Managing Partner of  
Seigneur Gustafson  
LLP CPAs



**Steve Wingert, CLM**  
Principal at Nesso Strategies

**REGISTER TODAY!** [alanet.org/lfme](http://alanet.org/lfme)

## Cyber Liability Insurance

By Mary Chancellor, President



We have all read the reports and heard the alarm bells ring and yet we still believe that it will never happen to us. After all we have “Computer Technicians” dedicated to making sure we have Firewall, Anti-Virus, Malware and all of the other safeguards in place to ensure no one will hack into our computers. Let us be honest, there is no such thing as perfect security, most companies will experience a data breach incident.

Well it does happen, each and every day. Cyber Attacks have been around for many years and the perpetrators have become more sophisticated and devious - The attacks are not just domestic, rather they are coming in from all corners of the world!! Such intrusions not only compromise our daily operations, but breached & stolen data may expose the firm’s partners, officers, and employees to potentially costly litigation and even greater opportunity costs. By the time you have knowledge of the attack to your network, the personal and private data of your clients and employees have already been compromised.

You are a Law Firm, you do not believe you will have the exposure? How about the attorney who leaves a laptop, tablet, smart phone in a car, hotel, restaurant etc. and said items are either stolen or compromised? You all know there is confidential information pertaining to clients and possibly employees stored in these devices. What about the employee who checks his/her personal emails at work and accidentally opens up an email which turns out to be from a potential hacker. As your firm expands you need to assess how you exchange information and client data on your systems.

You have exposure, we all do!

### **What can you do to mitigate the damages? CYBER LIABILITY INSURANCE.**

Cyber liability Insurance Coverage offers cutting edge protection from exposures arising out of internet communications.

### **What does Cyber Liability Insurance do and what does it cover:**

Privacy Liability:	Loss of personally identifiable employee and customer information
Security Liability:	Failure to prevent the entrance of virus or hacker
Website Media:	Libel, slander and copyright infringement from your website content
First Party Cyber Extortion:	Expenses to respond to a threat to harm or release your data as well as cover ransom payments if necessary
First Party Breach Response:	Customer Notification Expense Credit Monitoring Expense Computer and Legal Forensic Expense Credit and Identity Repair Expense Public Relations PCI Fines and Penalties



## First Party Business Interruption and Data Recovery Extra Expense Regulatory Defense and Penalty

There are many Cyber policies available and no two policies are the same. It is important to discuss with your broker the various options available and what language best suits your needs. One important factor would be to ensure the carrier you are partnering with has management services/risk management which will assist you from the beginning of the crisis to the end avoiding panic and additional stress.

Even with the most sophisticated security, Cyber Attacks are occurring at an alarming rate. Privacy laws have become more prevalent which has left us more accountable for the unknown. It is extremely important that you do take the necessary steps to protect your firm, business, clients and employees.

*Mary Chancellor, President, Christopher Pro Insurance Services*  
CA Insurance License 0122517  
[mary@christopherproinsurance.com](mailto:mary@christopherproinsurance.com)  
Tel: 831-624-3591



## Get the VIP treatment from ALA's VIP Partners



AS AN ALA MEMBER, SAVE MONEY AND RECEIVE EXCLUSIVE BENEFITS  
ALL YEAR THROUGH VIP PARTNERS.



## ALA'S JOB BANK

The elite job marketplace for business of law leaders

*Single source solution for legal management excellence:*

- Post or browse ads and resumes
- Target the most qualified candidates
- Save time with one-stop sourcing





## Administrator Spotlight

### Lori Hiles, Office Manager, Hueston Hennigan LLP

The August administrator spotlight features Lori Hiles, Office Manager for Hueston Hennigan LLP, a bet-the-company trial and litigation firm based in Newport Beach and Los Angeles. Hueston Hennigan LLP was formed in January of this year, when 30 lawyers from Irell & Manella LLP launched – literally overnight – a national practice.

Lori's main responsibilities include supporting founding partner, John Hueston, acting as a client liaison, training support staff, and ensuring smooth and efficient operations during this time of consistent growth. Lori has been in the role for six months.

The greatest challenge has been in trying to create a seamless transition for the initial 30 lawyers spread across two offices as well as assisting with managing the growth to nearly 40 lawyers in 6 months – all while concurrently being involved in the build-out of an entire floor, which requires interaction with various construction managers and vendors, as well as managing the expectations and needs of the attorneys and staff. While the first few months were exhausting, they were also exhilarating, and Lori relishes the opportunity to be a part of the success created by this extraordinary group of people.

According to name partner John Hueston, Lori has been an essential part of the firm's early success: "Lori is a truly gifted administrator who is dedicated to achieving perfection while constantly challenging herself to master a diversity of skills such as client service, staff training, office design, and methodologies for enhanced productivity and efficiency. The founding partners of our firm view her as a key part of our enterprise, and Lori has already managed to exceed our already very high expectations."

Lori began her career as a legal assistant for a small medical malpractice firm shortly after graduating from Pepperdine. Her employers have routinely provided her varied and significant opportunities to learn and develop her skills. As such, the experiences of the past 26 years have built a strong foundation on which to draw from while embarking on this new adventure.

Lori greatly admires Kristi Cole, a paralegal/administrator in Long Beach. Lori and Kristi worked together for four years and continue to remain in contact. Kristi exemplifies grace under pressure, providing a constant example of how one should comport oneself in stressful situations, all while striving to maintain a healthy work/life balance. As Lori's role evolves, she hopes to follow in Kristi's footsteps by handling the increasing requirements of managing a law firm in the same adept manner.

Lori has been married 28 years. Her three sons represent the 4<sup>th</sup> generation of her family to be born and raised in the City of Orange. Lori enjoys gardening, photography and traveling with her family. 🍊

## 2015 ALA Annual Conference— Nashville Scholarship Winners

ALA hosted a great annual conference in Nashville this year. I was privileged enough to attend and honored to win a scholarship from the OC-ALA Chapter. Thank you OC-ALA!

The sessions offered at this year's conference were excellent and provided a variety of educational opportunities for every role in our industry. Listening to the keynote speaker, Alison Levine, "Success Strategies from the 7 Summits" provided a positive perspective on taking risks, improving and enhancing teamwork, and dealing with change. I learned in "Navigating Difficult Conversations," that the madder you are, the stupider you are! Also, all behavior makes sense—people do what they do based on their reality. Our job is not take the bait and judge, it is to be curious. Finally, my favorite, "If you can't find anything nice to say, then find a nice way to say it." In, "What the Future of the Legal Profession Really Holds," merger and acquisitions as well as corporate firms are doing fairly well, lawyers are least likely to be replaced by computers while tax preparers and insurance underwriters are most likely. The world will not be dominated by 10-20 mega law firms. Instead, firm strategy is leaning towards more segmentation and specialization, focusing on specific practices, industries and geographies. I was surprised to learn of the lack of transparency in "Dewey LeBoeuf Aftermath" as well as the involvement of their management and accounting team currently in trial.

I thoroughly enjoyed walking through the BP hall. I was like a kid in a candy store with all the new technology and services available. Thank you to those local BPs who made the trip to attend National Conference. It is always good to see a familiar face. Special thanks to those hosting an evening party/event. Good times!

Shouts out to Jeanette Vella, who won backstage passes to the VIP concert with Rick Springfield. Congrats!!

Nashville weather was cold and crisp one day and raining humid the next. I found live country music everywhere, which I love. In my free time, I went to the famous Bluebird Café, the Ryman Auditorium for a tour and a show, Country Music Hill of Fame and Museum, did a hop on hop off bus throughout the city, Union Station, Bridgestone Arena where a friend met Trace Adkins, and walked the infamous Broadway. I ate at so many locations and those that stood out are Jack's Famous BBQ, Pancake Pantry and Jeni's Ice Cream shop, brown butter almond brittle... mmm!

Overall, great conference in a great location!

- **Gabrielle Fischer**, Allen Matkins





## BUSINESS OF LAW CONFERENCES

**REGISTER  
NOW**

### WEST

LAS VEGAS, NV  
OCTOBER 22-24

### EAST

ATLANTA, GA  
OCTOBER 1-3

### CENTRAL

NEW ORLEANS, LA  
SEPTEMBER 10-12

**YOU CHOOSE  
YOUR DESTINATION.**  
Visit [alanet.org/blc](http://alanet.org/blc).

## EVOLVING THE BUSINESS OF LAW

Don't miss **the premier event** for legal management professionals!

**Each conference location will deliver the same high-caliber curriculum** for legal administrators, managers, and functional specialists. Build your skills or earn certification credits with the following courses:

- ▶ Managing a Crisis and Dealing with the Media
- ▶ Pricing in Today's Legal Market
- ▶ Fostering Creativity and Innovation Agility
- ▶ Technology Trends Driving Change
- ▶ Harassment Prevention and Diversity
- ▶ How to Cultivate Employee Accountability
- ▶ ... and more!



**MARIANNA BORRELLI**  
Director of Operations  
Sherin and Lodgen LLP

**“The ALA Business of Law Conference was an amazing experience. The selection of venues allowed chapter members to network with different vendors and members across the country. This was a great format!”**

The 2015 Association of Legal Administrators Conference and Expo was held in Nashville, Tennessee in May. There were 2,000 attendees and exhibitors at the conference. OC-ALA was well represented, as evidenced by the testimonials below. Thank you to all who attended and represented OC-ALA!

There were some sweet tunes in Nashville! A few of my favorite sessions:

Alison Levine's keynote address detailing her experiences in leading a team of women up Mount Everest was an extraordinary tale. The trials and challenges she faced in preparing for and making the climb make the challenges in my daily life pale by comparison. I figure, if she can make that grueling trek, I can certainly get through one more email before calling it a day...

Cyber liability insurance is a hot topic these days, and the information about coverage options has been quite mysterious and confusing. Regan Miller's session covering cyber liability insurance was packed full of specific and valuable information that will help me guide my firm to the best coverage for our needs.

Who doesn't need help Navigating Difficult Conversations? I know I do! This two-part session was worth every minute. Sue Wazny provided a number of valuable tools I can use. The first being a strong reminder that a large part of the solution is actually listening to the other person so I can better understand their concerns. Hmmm, close my mouth and open my ears? I'll give that a try!

Nashville brought us another valuable ALA conference which offered a large array of topics covered by some great speakers. It doesn't hurt that we were surrounded by live music everywhere in the city, including the roving guitar players within the conference center itself. I will forever be grateful for the scholarship that permitted me to attend!

- **Jennifer Bodenhoefer**

---

Ya all should have been in Nashville! As always ALA provided another amazing educational event.

In addition to great education on leadership and all the advances in the business of law, we also had a great "Legal Marketplace" where many of our Business Partners exhibited some amazing solutions for us to bring back to our offices.

At the conference ALA announced two more VIP programs that were added to the mix for our offices. Comprehensive legal professional liability insurance coverage and 24/7/365 access to medical assistance through a program called Teladoc. The program provides access to U.S. board-certified doctors through telephone or online video consults who can resolve many medical issues wherever you happen to be, resulting in less absenteeism, reduced costs to both the patient and the law firm, and enhanced employee benefits.

As always in addition to education we always have fun. The Rick Springfield concert sponsored by the VIP Business Partners was held at the Ryman Theater and a good time was had by all.

- **Toni Burnside**



It was my pleasure to receive a scholarship to the 2015 ALA Conference in Nashville, Tennessee, and what an exciting, busy time it was! There were great keynote speakers and tons of sessions to choose from. I hadn't been to Nashville for many years, and it was wonderful to be back there again in the heart of Music City. What a beautiful city! We were privileged to have the conference in a brand new convention center as well as a brand new hotel across the street – all only 2 years old!

The Conference Committee really put a lot of thought and energy into the planning as there were lots of new ideas implemented at the conference. They were really thinking “outside the box”. New sessions included Bold Bites, Ignite Talks, and Interviews of distinguished guests and experts. There were so many choices – we could never be bored!

Although I have been to a number of conferences, I still found it difficult to pick from all the many great sessions available. I particularly enjoyed the session of Jack Singer on Developing and Maintaining as a Champion Legal Administrator. His emphasis on “Linguistic Nutrition” encouraged us to talk to ourselves in a positive way, and he emphasized what a difference this makes for everyone. His words struck a chord with me and allowed me to realize changes I needed to make in my self-talk. Thanks for giving me the opportunity to attend an excellent Conference!

- **Linda Galloway**, Administrator, Declues, Burkett & Thompson, LLP

---

I am so grateful for the scholarship provided by the Chapter that allowed me to attend the National Conference in Nashville. The time was great from the perspective of networking and opportunities to spend time with others in our Chapter and I truly believe the conference was one of the best I have attended. The speakers were some of the best I have heard and I left with pages of notes and “real life” examples of things I could do to enhance my performance and make me a better administrator.

One of the most meaningful sessions I attended was presented by Monica Wofford regarding *Contagious Leadership: When Your Skills Need to Grow, Spread and Infect Them*. She shared the following attributes of good leaders:

1. They value and respect the unique qualities and skills of each person they work with;
2. They take interest in the growth of those they lead;
3. They ask for help from those they lead;
4. They micro-manage only those who need it and only until they prove they no longer need it;

5. They provide praise—however leaders need to be aware of the type of praise and recognition the people prefer;
6. They speak clearly—they LISTEN;
7. They accept and ask for the opinions of others—even when they are different from their own;
8. They give feedback;
9. They take action.

She helped me to understand that I may be hitting on some of these skills but still need to work to improve in others.

As always, I left the conference with pages of notes, ideas and goals for my growth and the growth of those I have the privilege to lead.

Thank you again to the Chapter for allowing me this awesome opportunity.

- **Kathie Jones, CLM**

**SAVE THE DATE**

**FEBRUARY 5, 2016**



The Annual Chapter Education Summit (ACES) was developed to offer Legal Administrators and Managers an opportunity to learn and exchange vital information with other Administrators, Legal Managers, Industry Leaders, and Business Partners.



HILTON HOTEL, IRVINE/AIRPORT

18800 MACARTHUR BLVD, IRVINE, CA 92612

## Lessons In Adaptability: How To Teach Yourself To Stay Relevant

By Rahim Charania

Of all the characteristics that are touted as the cornerstone of success in entrepreneurship—financial management, time management, passion, work ethic, etc.—adaptability is the one that is the least discussed and understood.

Adaptability is defined as the ability to adjust oneself readily to different conditions. These different conditions are most commonly assumed to originate from changes in the economy, market conditions or even disruptive technologies that change the industry landscape entirely. While these changes are things that every business—startup or established—has to deal with, there is a greater adaptability issue that entrepreneurs have to face, and that is adapting to their evolving business idea. When starting a new business, founders will have certain ideas about their target market, the projected use of their product or service, and even the pricing classification that they anticipate offering. However, within the first 365 days of starting a new business, every entrepreneur learns many things they did not know about before they began.

Entrepreneurs learn lessons that help to speed up their time to market and increase revenue, as well as face numerous expenses that they did not anticipate. Many times, the same entrepreneurs face the harsh reality that their plan was insufficient in understanding the intensity of the competitive landscape, the size of the available market or the sales cycle and their respective times to close. These are all things the entrepreneur will have to understand, and, if they want to succeed, adapt to.

Without the ability to adapt to these changes, entrepreneurs continue to work diligently on programs and opportunities that are either no longer relevant or are losing relevance every day. And at the end of this path, they wonder what went wrong.

### Three Lessons In Adaptability

To avoid this, there are three critical steps to ensure you are keeping your adaptability meter on high alert:

#### 1. Always reassess your plan for the current environment.

##### Ask yourself:

- a. Is my idea still relevant?
- b. Is my strategic plan for development still the best way to enter the market and capture market share?
- c. Have I clearly identified and accepted the new risks and issues that I know about the business that I did not know before?

#### 2. Avoid strict structures and decision biases when evaluating your current or proposed strategy.

If you can keep an open mind in regards to the uses and avenues for your business to grow, you can always

[Lessons in Adaptability](#)—continued on page 25

## Top 10: Legal Research Headlines

By Daniel Raphael, President, Law Library Advisors

The legal publishing world is constantly evolving. New acquisitions and innovative startups have a direct impact on the tools attorneys use – and their cost. Here are the top events of the last quarter to keep OC-ALA administrators in the know:

1. **Westlaw** continues to phase itself out to make way for **WestlawNext**, with all law firms expected to transition by the end of August, 2015.
2. **Lexis Advance Tax** debuted as a new portal for tax practitioners.
3. Morningstar announced that its securities research database **10K Wizard** will be abandoned in 2016, and its users redirected to competitor **Intelligize**.
4. Legal research site **Casetext** launched **LegalPad**, a publishing platform designed to link attorneys' articles with the cases they reference.
5. IP Litigation data analytics site **Lex Machina** won Best New Product of 2015 by the American Association of Law Librarians.
6. File & ServeXpress introduced **CaseEdge** offering a single website for a law firm's business functions including legal research, case management, lead generation, calendaring, file storage, time and billing, and more.
7. BLR released **State Law Chart Builder** as the first online system to summarize employer rights and obligations in each state in the U.S.
8. **Bloomberg Law** unveiled a new platform for corporate transactional lawyers, and a new online journal covering Tech and Telecom.
9. **Thomson Reuters** rolled out **Legal Professional Community**, a social network targeted towards small firms.
10. **CEB** published a new treatise, Employee Leave Laws: Compliance and Litigation, designed to help employers navigate the newly amended California Family Rights Act regulations.

*Daniel Raphael is the president of Law Library Advisors, helping OC-ALA administrators manage their legal research subscriptions efficiently and effectively. He can be reached at [Dan@LawLibraryAdvisors.com](mailto:Dan@LawLibraryAdvisors.com).*



*Your anytime, anywhere,  
business of law eLearning solution.*

*Your connection  
to knowledge, resources and networking*



*Register today: [alanet.org/elearning](http://alanet.org/elearning)*



# Out and About with OC-ALA

## Networking Event: *Bocce Ball, Cocktails & Antipasto at Il Fornaio*

On June 25<sup>th</sup>, we had our first networking event of the new board year. As you can see by the photos, we had a great turnout and lots of fun playing bocce ball, sharing conversation and enjoying the wonderful food at Il Fornaio. The weather was perfect for this evening event.





## Silver Business Partners





## ALA Distinguished Members

ALA gives special recognition to members who have maintained 25 or more years of continuous and uninterrupted member. These individuals are known as the Association's Distinguished Members. Here is a list of our OC-ALA Members who have meet this requirement, they are:

Nancy Adams	Mary Lou Czerner	Bonita Danser	Judy Finnegan, CLM	Linda Galloway
Connie Jedrzejewski	Susan Jerome	W. Dale Langley	Elizabeth Langston	Margaret Lovig
Sandra Ophus	Sharon Owen	Diane Perkison	Marilyn O. Philipp, CLM	Beverly Stevenson
Jim Van Dusen CLM	Donna Williams			

## *Welcome New Members*

OC-ALA extends a warm welcome and looks forward to working with its new members.

Carolyn Baker Kaufman Steinberg LLP 2020 Main Street, Suite 345 Irvine, CA 92614 T: (949) 757-9000 E: cbaker@kaufmansteinberg.com	Teri Bertoni Rogers Nemeth Germain PC 18401 Von Karman Ave., Suite 260 Irvine, CA 92612 T: (949) 247-7970 E: tbertoni@rnglawfirm.com	Naomi Fang Thompson Colburn LLP 2029 Century Park West, 19th Fl. Los Angeles, CA 90067 T: (310) 282-9454 E: nfang@thompsoncolburn.com
--	---	--

Lori Hiles Hueston & Hennigan LLP 620 Newport Center Drive Suite 1300 Newport Beach, CA 92660 T: (949) 229-8640 E: lhiles@hueston.com	Clare Radecki Malcolm Cisneros 2112 Business Center Drive Irvine, CA 92612 T: (949) 214-2424
---	--

## *Member Changes*

**Risa Robitaille** has changed firms: Risa can now be reached at Stuart Kane, 620 Newport Center Dr. #200, Newport Beach, CA 92660 T: (949) 791-5128

**Stacy Morrison, CLM** has changed firms: Stacy can now be reached at Green & Hall, 1851 E. First St., 10th Fl., Santa Ana, CA 92705 T: (949) 918-7000

**Joyce Kopenski** can now be reached at JAK Consulting, jakopenski@verizon.net T: (714) 335-4814

# *Happy Anniversary* to OC-ALA Members!

## **34 years**

Bonita Danser

## **32 years**

Judith Finnegan, CLM

## **31 years**

Carolyn Berger  
Sharon Owen

## **28 years**

Elizabeth Langston  
Beverly Stevenson

## **24 years**

Maryann Aniversario

## **23 years**

Patrick Smith

## **22 years**

Andrea Bryant

## **20 years**

Steven Morris, CLM  
Donna Tsuma, CLM

## **18 years**

Tissy Smith  
Debbie Randall  
Toni Burnside

## **17 years**

Nancy Eberhart  
Tony Malkani

## **15 years**

Marcia Peterson  
John Fournier

## **14 years**

Dorothy Rausa  
Lynda B. Taylor

## **13 years**

Joy Bailey  
Marcia Zigrang, CLM, SPHR, SHR  
Laurali Kobal

## **12 years**

Jessica Daugherty  
W. James Van Dusen, CLM

## **10 years**

Gabrielle Fischer

## **9 years**

Susan Elsass

## **7 years**

Terry Vickrey  
Elijah Bernal  
Lisa Smith

## **6 years**

Tony Mannara  
Mark Neighbors

## **5 years**

Kathleen Whalen, CPA  
Judith Goodlin  
Diana Sobel  
Carrie Tinker  
Hilary Martin

## **3 years**

Gianna Stover  
Christie Sullivan  
Dee Ramsey

## **2 years**

Samantha Fabrigas  
Patrick Stevens  
Ann Thompson  
Donna Bustos

## **1 year**

Miriam Granados  
Cindy Bennett  
Andrea Greil  
Lisa Bettendorf  
Jennifer Miramontes



## **HELP SUPPORT**

the **Foundation of ALA's** charitable,  
educational and research programs.



**Foundation of the  
Association of  
Legal Administrators**

advancing knowledge, creating opportunities, touching lives

## **DONATE !**

[alanet.org/foundation](http://alanet.org/foundation)

# Welcome OC-ALA's Newest Business Partners



## Beacon Hill Legal

Contact: Karen Maheu, Division Director  
19800 MacArthur Blvd., Suite 480  
Irvine, CA 92612  
T: (949) 551-3400  
Email: kmaheu@beaconhillsg.com



## Buettner Insurance Agency, Inc.

Contact: Scott Buettner  
5200 Warner Avenue, Suite 105  
Huntington Beach, CA 92649  
T: (714) 377-0600  
Email: scott@biabenefits.com



## The Gunlocke Company

Contact: Paula Clark, Business Development Manager  
One Gunlocke Drive  
Wayland, NY 14572  
T: (619) 925-0039  
Email: clarkp@gunlocke.com



## Jaffee

Contact: Debbie Douglas, Senior Vice President, Public Relations  
15 Padua Court  
Newport Coast, CA 92657  
T: (949) 375-3436  
Email: ddouglas@jaffeepr.com  
www.jaffeepr.com



## JetLuxInc

Contact: Richard Brosal, President/CEO  
6380 S. Valley View Blvd., Suite 114  
Las Vegas, NV 89118  
T: (702) 410-2905  
Email: rbrosal@jetluxinc.com  
www.jetluxinc.com



## Trinet Ambrose

Contact: Ryan Michas, VP Legal Markets-Ambrose  
3333 Michelson Drive, Suite 260  
Irvine, CA 92612  
T: (805) 252-3606  
Email: ryan.michas@trinet.com  
www.trinet.com

## Business Partner Update: Merrill Legal is acquired by DTI.



Merrill Legal has been officially acquired by DTI as of June 1, 2015. DTI will continue to provide comprehensive onsite and offsite outsourcing solutions including copy-print, mailroom management, records management, litigation production, managed print services and other office support. Tim Sheehan remains as Director of Sales, Managed Services. Tim can be reached at (213) 949-7890 or tim.sheehan@dtiglobal.com www.dtiglobal.com

## ? Questions & Answers ?

**1. One of your attorneys has been asked to become a member of a client's board of directors. What should be your main concern?**

- (a) The attorney may not be skilled to advise the board of directors in the complete scope of legal issues that may arise during board meetings
- (b) The attorney may be inclined to accept work projects either outside of the scope of the firm's resources and/or with unrealistic deadlines just to satisfy specific members of the board
- (c) The attorney's actions as a director may not be covered by your firm's professional liability insurance policy
- (d) The attorney's time may be redirected away from the practice of law to the interests of the corporation for which he or she is a director

**2. "Claims made" professional liability insurance policies typically include a provision for "prior acts" coverage. This coverage reaches back in time to a period prior to the policy period. A condition precedent to this coverage is that the insured individual:**

- (a) Purchased an extended reporting option at the conclusion of the prior policy period
- (b) Notified the carrier during the policy year in which the act, error or omission occurred of the possibility that something had happened that could give rise to a future claim
- (c) Diligently pursued a path to mitigate damages from some act, error or omission which was reported to the carrier in a subsequent period because of an unanticipated event
- (d) Did not know or could not have reasonably known that a particular act would result in a claim

**3. What is the function of Application Service Providers (ASPs)?**

- (a) To provide in-house help desk services to organizations
- (b) To host software applications and store data accessible over the Internet
- (c) To link voice and data systems using fiber optics
- (d) To provide analysis of optimal software applications to maximize workflow

**4. In the strategic planning process, what addresses (a) what is involved, (b) when it begins and ends, (c) who will do it, (d) how much it will cost, and (e) the expected outcomes?**

- (a) Vision statement
- (b) Goals statement
- (c) Statement of objectives
- (d) Action plan

**Answers:** 1. c 2. d 3. b 4. d



## OC-ALA's Upcoming Calendar of Events

[www.OrangeCountyALA.org](http://www.OrangeCountyALA.org)

Wednesday, August 12, 2015 [Small Firm Section Meeting](#) "Employee Recognition Programs"

Wednesday, August 12, 2015 [GLA-ALA's Business Partner Appreciation Evening](#) at FantaSea Yachts

Thursday, August 13, 2015 [Board Meeting](#), Sedgwick, Irvine

Friday, August 14, 2015 Project SELF—Last Day At Firms

Wednesday, August 19, 2015 [Webinar](#) "De-Mystifying Data Breaches and Information Security Compliance"

Thursday, August 20, 2015 [Large Firm/Branch Office Meeting](#) "Law Firm Culture—What is it and How Might it Thrive in Multi-Office Environments?"

Thursday, August 26, 2015 [General Meeting](#) "Payroll and HR Pitfalls that Prevent ACA Compliance: Next Steps?"

Thursday, September 3, 2015 [Webinar](#) "Creating Proactive Leadership"

Wednesday, September 9, 2015 CLM Application Deadline

Thursday, September 10, 2015 [ALA Business of Law Conference-Central](#)

Tuesday, September 15, 2015 [Webinar](#) "Balancing Risks & Benefits: A Fresh New Approach to IP Outsourcing"

Wednesday, September 16, 2016 [Webinar](#) "Attracting & Retaining Top Talent: Flexible Work Arrangements Options"

## SAVE THE DATE NOW FOR THESE UPCOMING EVENTS!

Thursday, October 15, 2015 [Networking Event](#) Wine Tasting & Pizza Experience!

Thursday, October 29, 2015 [Business Partner Appreciation Event](#) Twenty Eight Restaurant, Irvine

Saturday, January 9, 2016 [Civil Litigation Course Begins](#)

Friday, February 5, 2016 [ACES](#), Hilton Hotel Irvine/Airport

To register for an event, click on the link. To view the calendar in its entirety, click [here](#).

suited to find a solution. You might find that a product you have developed for the commercial market is best for the consumer market. If you are mired down in strict structures and decision biases favoring commercial applications, you can miss the boat on a great opportunity to build a business that services a large number of consumers and provides your organization the capital and experience it needs to evolve your product.

**3. Don't be afraid to change your mind or accept that you were wrong in your assessment of the market, the economy or your own product.**

Fear is something entrepreneurs have to regularly look past or work through. Fear of failure is something that is hard to deal with especially when you perceive that failure to be of your own making. To readily adapt to new opportunities, set aside this fear and just go for it. Otherwise, you will continue down a path that will lead to a permanent type of failure that will not be good for you or your company in the long run.

Adaptability is a quality that we cannot set aside as we grow. We have seen many companies that have lost tremendous market share because they did not adapt to the changing environment—[IBM](#) losing the opportunity to conquer the personal computer market, Kodak with pictures and film, or the U.S. Auto industry in the late 1970s with fuel-efficient vehicles. Add adaptability to your list of entrepreneurial strengths and you will always find opportunity even in the moments that seem to be immersed in failure.

*Rahim Charania is the founder and Chief Executive Officer of [American Fueling Systems](#). This article has been reprinted with permission by the author.*



## ALA WEBINARS\*

Subscribe today and access the full 2015 webinar series!  
\*in partnership with WestLegalEd



[alanet.org/webinars](http://alanet.org/webinars)

ON DEMAND • ON TOPIC • ON YOUR SCHEDULE



# AS A CLM, YOU'LL CREATE A BRIGHTER FUTURE.





## Corporate Law Department Symposium

*Hosted by the Boeing Law Department*

September 17, 2015 | Chicago, IL

## Drive Results in Your Legal Department

ALA's Corporate Law Department Symposium can show you how.

Join us September 17 for Corporate Law Department Symposium, hosted by the Boeing Company Legal Department. This exciting event offers one day of high-level education surrounding some of the hottest topics in the corporate legal environment:

- ✓ Legal Process Improvement
- ✓ Using Metrics to Drive Results
- ✓ Achieving Value Harmony: Five Top Things Corporate Legal Departments and Law Firms Can Do Together
- ✓ The Role General Counsel Play in Cyber Security

Don't miss this exclusive event to gain insights into today's challenges and connect with other leaders in the business of law.



**REGISTER TODAY!**  
[alanet.org/clds](http://alanet.org/clds)