



NoVaNetwork

The Northern Virginia Chapter of the Association of Legal Administrators' Quarterly Newsletter

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PRESIDENT'S MESSAGE

**Stephanie Angelides,
President, Northern Virginia
Chapter of the ALA**

Dear Members,

It has been a busy year and continues to be challenging, yet very rewarding. I hope that you have been able to enjoy some of the many educational opportunities our chapter has offered this year, as well as the National conference and Regional conference. Robert Half Legal presented at our Career Summit and it was an informative and interactive presentation. The wonderful wine selection and drawings for gifts was a nice touch as well.

As in my last letter, I am stressing how critical your participation is to the success of our chapter. Our goal is to continue to grow and to offer educational opportunities and professional growth. We are planning a statewide retreat with the Richmond, Western Virginia and Hampton Roads chapters in March. It will be a great opportunity to attend seminars and meet other legal professionals to exchange ideas and build friendships.

We are also beginning to plan for the 2011 year of the Legal Administrator Section of the Fairfax Bar. This is a great resource and opportunity for us to further our

exposure in the legal community and assist others with professional development. We continue to welcome your participation with the many opportunities to help our chapter by serving on a committee. A few of our committees are business partner relations, membership, community challenge, and education. We especially need assistance with our newsletter and website committees. Personal involvement is very rewarding and benefits the entire chapter. I know that it is challenging, but I encourage you to make the time to become more involved.

Regards.

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VENDOR SPOTLIGHT

The Challenge of Information Management

Reid Palmieri and Laura Rogers
Account managers, Iron Mountain

Managing information used to be easier. Before the digital age, information lived primarily on paper, and it died either in storage or from shredding.

Today, the rise of technology, regulation and litigation has made managing and discovering information much harder and riskier for the organization trying to do it all themselves. For one, information exists in more places due to the proliferation of laptops, smartphones, iPads, thumbdrives and more – and if data growth weren't enough of a headache, the heightened regulatory climate has placed more rules on how we protect and handle our information. The penalties for losing information, or even failing to find it fast enough, have increased and become stiffer. Additionally, information exists in multiple formats and is decentralized like never before across an organization and its employees.

For these reasons, the need for an effective information management strategy has never been greater. An effective plan informs you on what to throw out and what to do with what you keep. When it comes to discovery requests, the right policies and processes ensure relevant data can be found, and fast corporate clients and their law firms with formalized records and information management policies are far better positioned to respond to litigation and avoid the embarrassment and penalties that come with not being able to provide data in a timely manner.

Despite these stakes, a remarkable 66 percent of nearly 3,500 publicly traded, government, and non-profit organizations surveyed by Iron Mountain have no formal methods in place for accessing and managing data for discovery. Moreover, only 13 percent of organizations manage electronic records in accordance with a retention schedule. An inability to account for information or understand what to keep and what to destroy are recipes for non-compliance and the penalties that ensue, both in fines and potential loss of business.

In February and March 2010, Iron Mountain met with customers from 58 law firms in New York, Boston, Philadelphia, Baltimore, Washington DC, and Chicago. Topics ranged from coping strategies inside the firms to feedback on our service to them over the last year. Participants were asked to cite three issues Iron Mountain could help them solve. What began as a lively exercise quickly became a roadmap for the direction of overdue improvements. The mandate from these firms was clear: Help us repurpose the traditional law firm experience for off-site storage and service into one that made more sense for the changing and more complex information management needs of its organization.

Iron Mountain took this mandate to heart. Taking a step back from a product-focused strategy, we sat down with each of our customers to gain a better understanding of the problems they are trying to solve. With

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Editorial Policy

ALA NoVa Network Newsletter is published quarterly for the members of the Northern Virginia Chapter of the Association of Legal Administrators to provide information and education for legal administrators, law office managers, law firm management, and others in law-related administration. This newsletter is not providing legal, financial, or tax advice. All articles, letters, and advertisements should not be considered endorsements by the Northern Virginia Chapter of the ALA. All written submissions are subject to editing by the editorial staff and become property of the Northern Virginia Chapter of the ALA.

Advertising is assigned on an annual basis based upon chapter sponsorship. For sponsorship information, please contact (Ben Sotelo at 703-506-1850).

ALA NOVA Mission Statement

The Northern Virginia Chapter serves its members by providing a forum for improving the quality of their profession and that of their law firms through the exchange of information and by providing educational opportunities to administrators and members of their firms.

The Northern Virginia Chapter was chartered in June 1980, and today has about 60 (NEW) active members, representing law firms, corporate legal departments, and government agencies. The Association of Legal Administrators (ALA) today has (NEW) over 10,000 members throughout the world. There are four ALA chapters in Virginia: Hampton Roads, Richmond, Western Virginia, and Northern Virginia.

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The Challenge of Information Management

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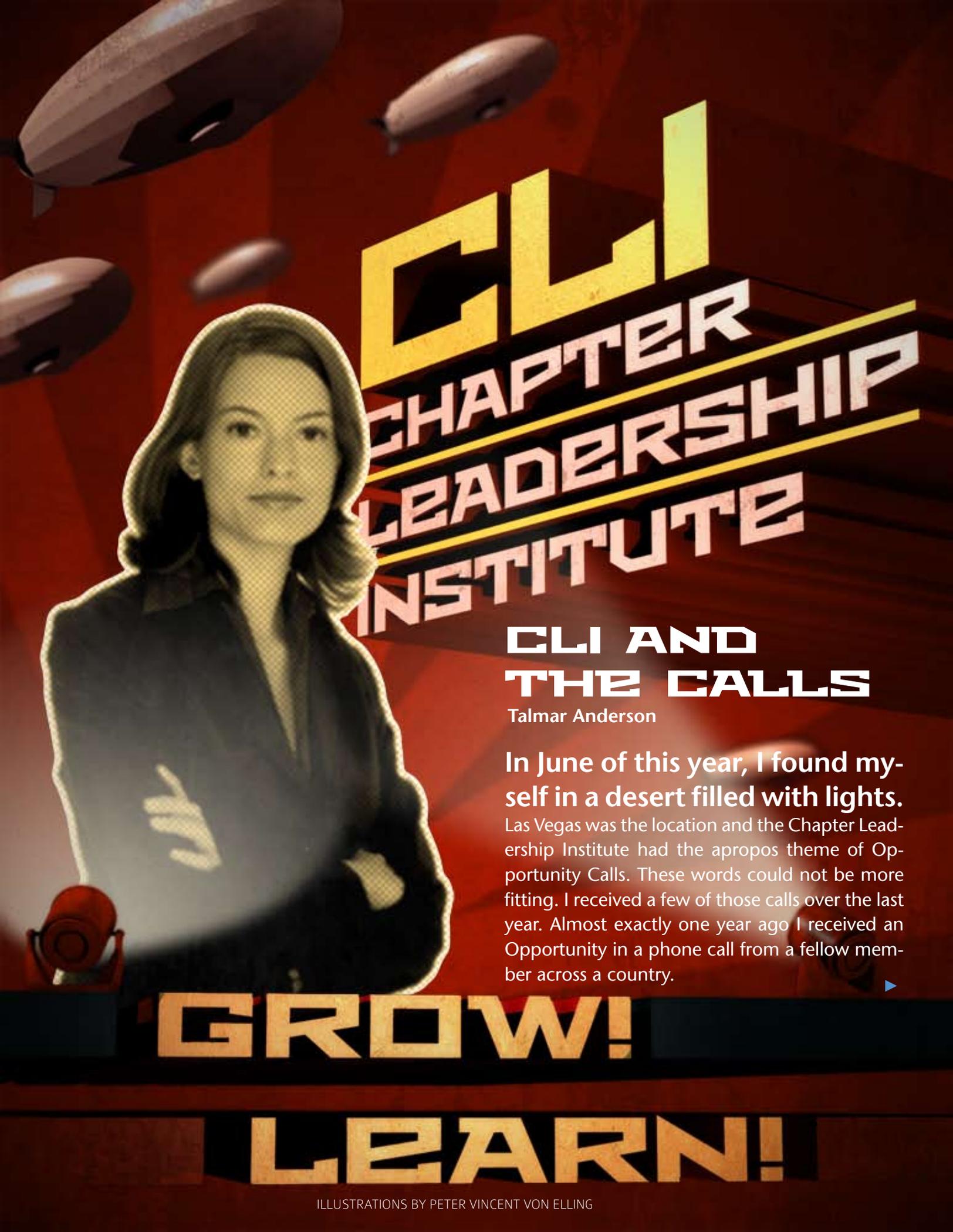
that knowledge in hand, we introduced packaged pricing models that focused on delivering solutions to problems, not just products, and provided them with a wealth of shared expertise from our team of consultants (some of whom are former litigators themselves). This approach enabled our customers to make better decisions on, and investments in, the solution they needed, while also creating a clearer path to efficiency and optimal performance. A solution could be adopted that would deliver both value (cost and performance) and flexibility to adapt with changing needs. As noted by Stephanie Angelides, Office Administrator, at the firm Venable LLP, "I value Iron Mountain's service. The quality of the service; both responsiveness and personal attention, is critical for us to be able to manage files efficiently."

Iron Mountain's objective is to help organizations like law firms manage client information with greater compliance, less cost

and in a way that gives them a competitive advantage. Achieving outstanding results doesn't happen by chance. Organizations that adopt best practices and work with a provider to conduct a risk assessment, survey and audit records, and build physical and digital systems to streamline and automate processes are poised for far greater success. "Today's records management environment is increasingly complex and challenging," says Bob Brennan, president and CEO of Iron Mountain. "But with the right solutions in place, it's possible to transform processes, reduce risk and manage costs."

Reid Palmieri and Laura Rogers are account managers at Iron Mountain, responsible for providing Total Customer Satisfaction through custom solutions, contract management and service excellence for many of the Mid-Atlantic area's most prominent law firms.





CLI CHAPTER LEADERSHIP INSTITUTE

CLI AND THE CALLS

Talmar Anderson

In June of this year, I found myself in a desert filled with lights.

Las Vegas was the location and the Chapter Leadership Institute had the apropos theme of Opportunity Calls. These words could not be more fitting. I received a few of those calls over the last year. Almost exactly one year ago I received an Opportunity in a phone call from a fellow member across a country. ▶

GROW!

LEARN!

CLI and The Calls

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Two months after that I had relocated to the Northern Virginia area. Two months after that I received the Call to step in and help the local chapter by acting as their Vice President in addition to Membership chair. I have learned that by taking the call of one opportunity, more are sure to follow.

The institute was a great opportunity to meet others involved in, or considering, the facilitating of our professional organization. The conferences, classes and discussions allowed us to become not just better Chapter leaders but better professionals overall. The ideas that were shared spanned growing membership, marketing campaigns and ways to continue in the professional association by volunteering for regional and national positions. It was intriguing to recognize that these volunteer positions will continue to open doors for us throughout our careers.

The chapter needs and challenges that were able to be addressed by all of us coming together were numerous. While reconnecting with leadership from the Valley of the Sun, I was able to address organizational issues that I was experiencing on the east coast. Getting to meet leaders from the chapters surrounding the Northern Virginia area helped to grow my network of referral sources on vendor needs and employment contacts. The open discussion with chapters of similar membership size helped me recognize the challenges we face as we consider growing.

And the opportunity that brought a “face” to the whole conference was getting to meet the Association of Legal Administrators team. Those people whose job it is to support the chapters and our needs. The

resources and friendly smiles were sincere and encouraged me when I found myself at home wanting someone to lean on. Opportunity calls whenever we allow ourselves to be open to the unexpected. While I did not expect to be the Vice President of the Northern Virginia Chapter in my first year out on the east coast, the opportunity to meet all these great people and help grow the Chapter is well worth taking the call!



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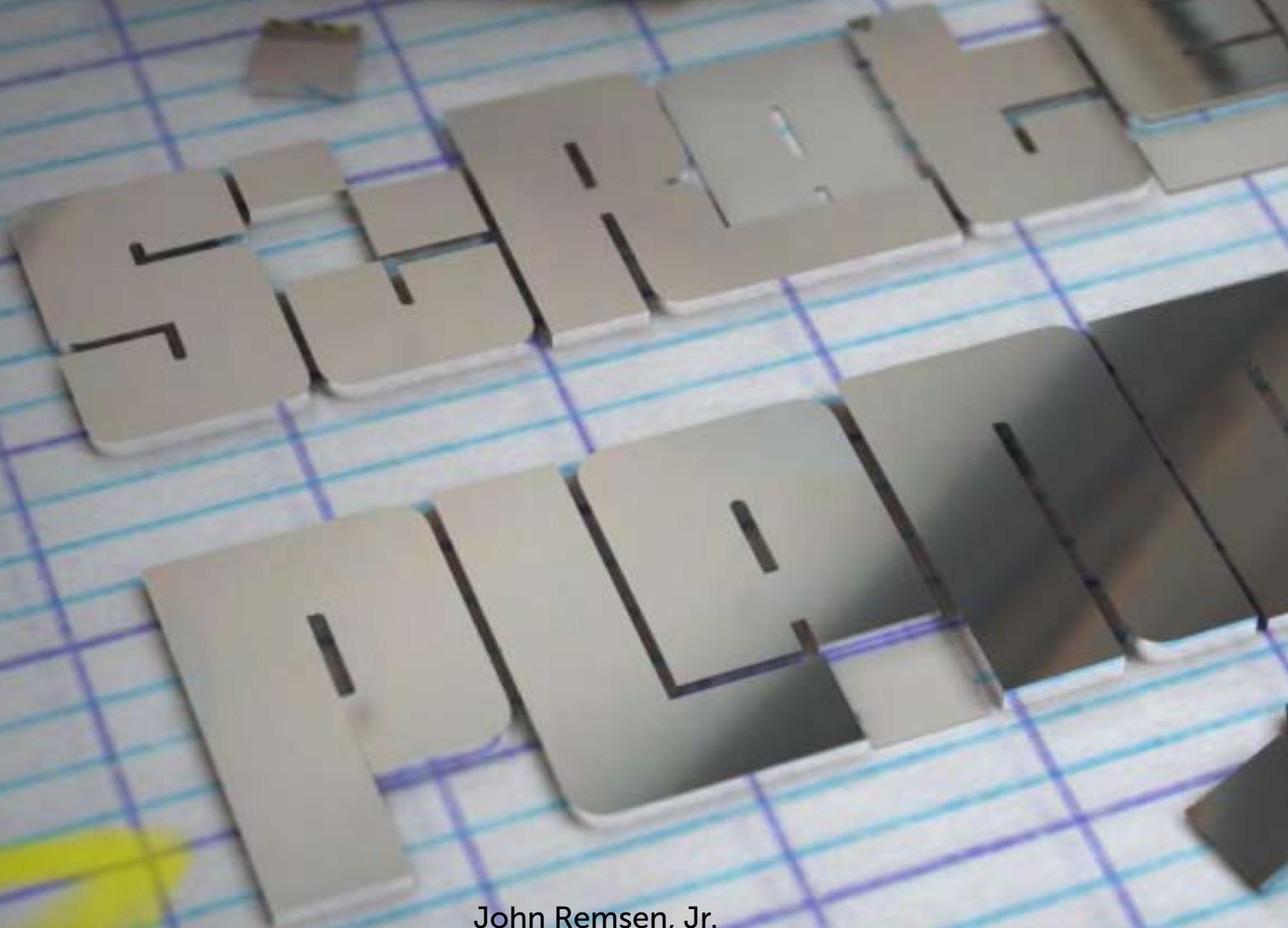
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ISN'T IT TIME THAT YOUR LAW FIRM DEVELOPS A STRATEGIC PLAN?

Today's Law Firm Can Either Take Charge of its Future or Sit on the Sidelines Watching the Marketplace Change Around It

In corporate America, virtually every successful company has a strategic plan guiding its future. Banks won't lend money without one. Shareholders and venture capitalists demand them. It gives an organization a competitive advantage.

Ask just about any managing partner or firm administrator whether his/her law firm should have a stra-

tegic plan and almost all of them would say, "yes." After all, without institutional direction, the law firm is little more than a collection of sole practitioners sharing office space...or a "hotel for lawyers," as our friend Bill Flannery likes to say. Yet, according to a recent survey, fewer than 5% of the law firms in the United States have such a plan in place.

Why then, do so few law firms have a strategic plan? And what does it take for a law firm to develop and implement one?

What is a Strategic Plan?

In short, strategic planning is a *process*, the result of which is a written document that sets forth where an organization wants to go and how it will get there. Many experienced law firm marketers suggest that a

There is a continuing denial among many attorneys that the business of lawyering has fundamentally changed.

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law firm's strategic plan should consider a five (5) year horizon. It should, among other things, state how big the firm will be, where it will have office locations, what its major practice areas will be, and what its client base will look like.

Once the firm's partners reach consensus on these big-picture issues, the firm can develop its three-year goals and objectives and then determine the strategies and tactics to achieve them. Strategies and tactics are more short-term in nature. They should be specific, measurable and achievable within a year.

So Why, Then, Do So Few Law Firms Have One?

If strategic planning is so important, why do so few law firms have one? The reasons vary, but the following obstacles are most common.

Denial that it's no Longer Business As Usual

Despite everything one reads in *The National Law Journal*, *The American Lawyer* and just about every other publication on the legal industry, there is a continuing denial among many attorneys that the *business* of lawyering has fundamentally changed. Times are good right now and, generally, firms are doing quite well. However, it is the firms that long ago recognized the value of planning that are emerging as the new leaders in the global marketplace for legal services.

Focus on the Short Term

Strategic planning looks at the future, while most law firms have a very short-term view of the world. Compensation systems often reward today's billable hour, with little reward for non-billable time invested in

the firm's future. That's very dangerous – shortsighted, to say the least.

Law firms need to measure and reward those activities – firm governance, associate mentoring and training, and business development – that are necessary to insure the firm's long-term prosperity.

Difficulty Establishing Consensus among Partners

No doubt, lawyers like their autonomy and tend to resist institutionalization. Many firms like to refer to themselves (with pride) as very democratic institutions. They operate very much like a collection of sole practitioners sharing office space. They want to be left alone.

On top of that, there are often very different philosophies among the firm's owners about the future of the firm. So it's easier not to talk about it.

Certainly, getting everyone to buy-in to a specific plan is challenging. There is a tendency among lawyers and law firms to want to be "all things to all people." In this type of culture, lawyers often resist any plan to move in a particular strategic direction and toward a more institutional way of thinking.

Lack of Leadership

Inevitably, the strategic planning process leads to change. And change requires leadership. Often, firm leadership is simply not willing to make the tough (and not always popular) decisions necessary to make the firm a stronger, more profitable institution in the long run. Managing Partners and Executive Committees must realize that they can't please everybody.

Failure to Implement

There are many firms that have made a half-hearted attempt at strategy planning and, for one reason or another, it has failed. The reasons are many and varied. Nobody seems to have the time to get things done. The plan exists, but it collects dust on a corner shelf. Inadequate resources were allocated to achieve the goals set forth in the plan. Or there was a lack of leadership. Or the plan was too ambitious. Or there was no accountability. And so on and so on.

The common refrain is, "We tried that, but it didn't work here." Chances are, the firm went through the motions, but there was never a genuine commitment to make implementation a priority. Without implementation, the planning process can be a frustrating waste of time, effort and money.

Keys to Successful Strategic Planning

Now that we've discussed why so many firms have not gotten around to developing a real strategic plan, let's examine the keys to making it happen.

Establish a Sense of Urgency

A sufficient number of lawyers in the firm must believe that it is no longer business as usual and that strategic direction is necessary if the firm is to survive and prosper in the years ahead. They must instill and constantly reinforce a sense of urgency that change is necessary.

Commitment from Firm Leadership

Firm leadership (or at least a critical majority) must have a genuine commitment to develop and implement a strategic plan. Without strong leadership and passionate

commitment, it is still “business as usual,” despite the rhetoric. Under these circumstances, the firm’s efforts are doomed to failure.

Involve all Partners in the Process

At the end of the day, the owners of the firm must buy-in to and support the plan. By involving each of them in the process through a series of one-on-one meetings and/or in a group brainstorming session, each partner will feel a part of the planning process. The likelihood of success jumps dramatically.

Associates and staff must also buy in to the future of the firm. Special programs that enlist their support will add to the plan’s successful implementation.

Keep the Plan Simple and Focused

If the firm is developing its first strategic plan, it should keep the plan simple and focused. Most firms try to take on too much, too fast and wind up accomplishing little. With a realistic plan and by starting slowly, the firm is able to maintain its focus on the most important projects. The firm can always add to the plan later. A law firm is wise to start slow, publicize success and grow from there.

Create a Plan that Lives and Breathes

Once a strategic plan is adopted, it does no good to set it aside, never to be looked at until the following year, if at all. The plan should be a flexible and dynamic instrument. Its principles should be incorporated into the firm’s day-to-day operations. Firm leadership should communicate the goals and objectives of the plan often and in a variety of ways throughout the firm. Make sure

everybody has a copy. Review it at internal meetings. Update it often. All important decisions should be considered in the context of the plan. If the firm makes decisions contrary to what is contained in the plan, it needs a new plan.

Establish Accountability

Nothing happens without accountability. For most firms, this is best accomplished at monthly meetings of small groups (5-6 individuals) of attorneys, often organized by practice group. There must be a strong group leader and meetings should have an agenda and meeting notes. Assignments must be made and progress must be monitored.

Measure and Reward Desired Behavior

Simply stated, the firm needs to measure and reward desired behavior. If the firm wants its partners to spend time training younger associates, the investment of non-billable time in the firm’s future must be measured and rewarded. If the firm determines that business development is important, it should reward it through recognition, origination credit, and/or by measuring and rewarding effort. Otherwise, behavior changes will not occur. Without incentives (or disincentives), it’s business as usual and there is little change.

Does Everybody Have A Role to Play?

There is no right or wrong answer here, but the firm must determine up front if all of its attorneys have a role to play when it comes to investing in the firm’s future. If so, what is the role of each attorney? What about associates? Is it the same for everybody or do we ask different attorneys to take on different responsibilities?

Making it Happen

The strategic plan is not an end, in and of itself. It is a *process* through which a law firm contemplates its future and determines how it will allocate resources to take it where it wants to go.

Without implementation, a strategic plan is worthless. Planning should never replace and distract from the *doing* part of the equation. Implementation must be given the highest priority.

Conclusion

Many sole practitioners and attorneys at smaller firms seem to think that strategic planning is for larger firms. However, any firm with an eye toward the future can benefit from the process. Planning can help a firm develop consensus on key big-picture issues, promote internal communication within the firm, inspire attorneys to get out and do things they wouldn’t otherwise do, and help the firm allocate its resources more effectively.

With leadership, commitment and a good strategic plan, any firm can develop a profitable practice working with clients it enjoys and in the areas of law it finds most appealing.

John Remsen, Jr. is the principal of The Remsen Group, a marketing consulting firm that works exclusively with law firms. He is the Past President of the Southeastern chapter of the Legal Marketing Association and served on its national Board of Directors. He can be reached at 404.885.9100 or jremsen@theremseengroup.com.

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At the end of the day, the owners of the firm must buy-in to and support the plan.

Event Calendar

For details on meeting locations/times, go to www.alanet.org and click on Chapter News for the Northern VA Chapter.

JANUARY 2011

14-15

ALA Board of Directors Meeting
Loews Ventana Canyon
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FEBRUARY 2011

4-5

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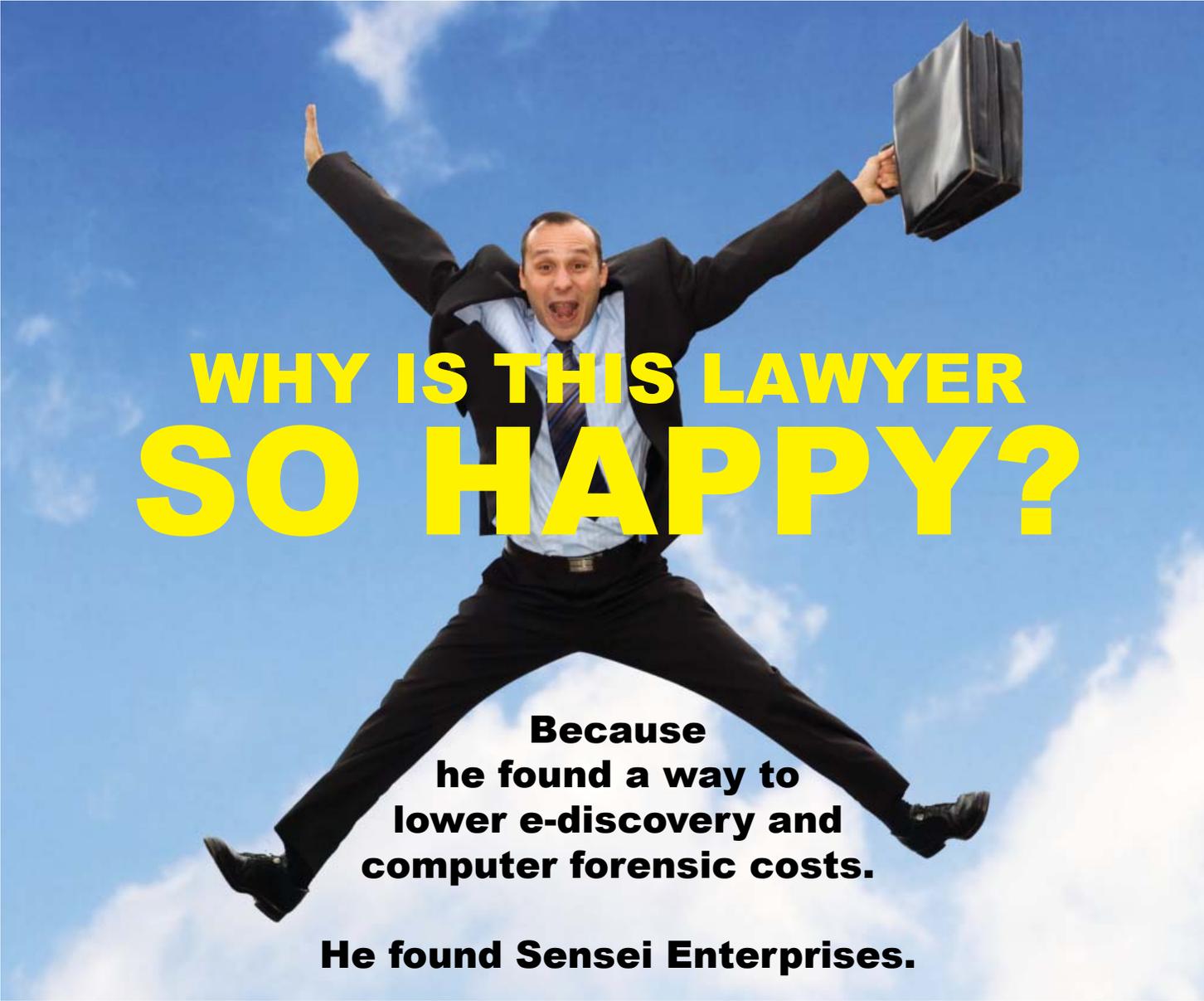
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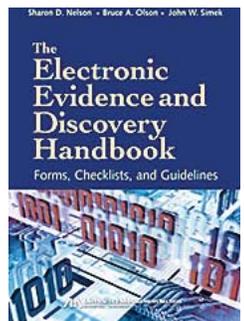
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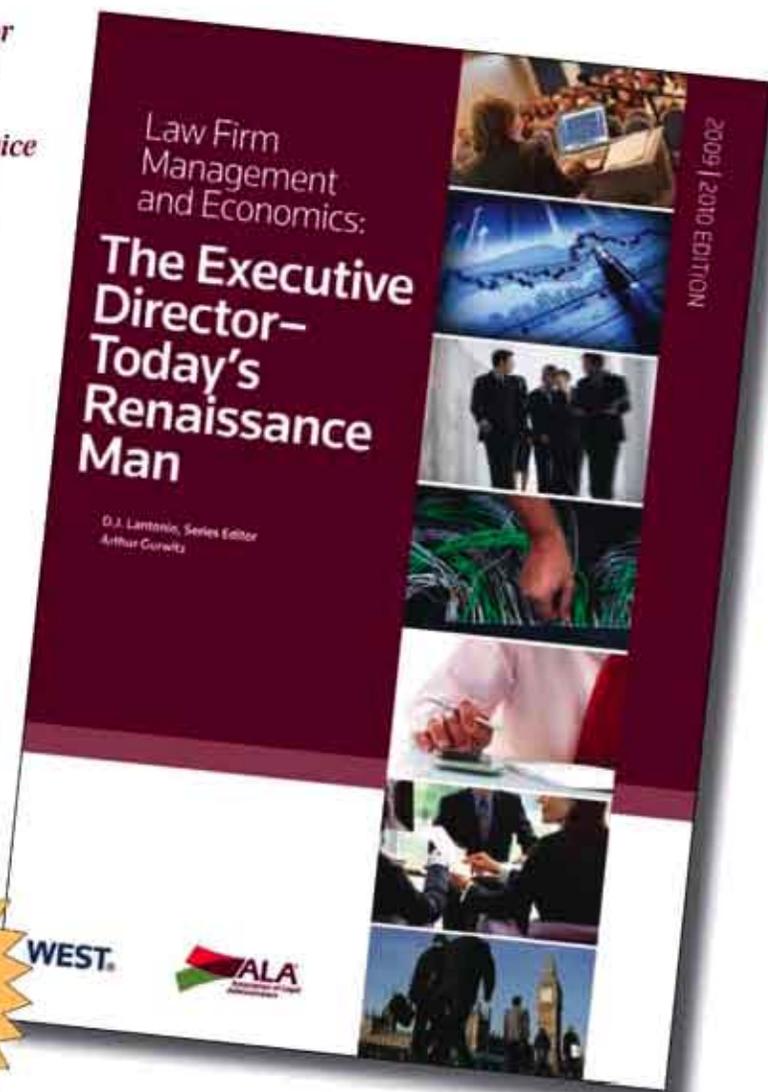
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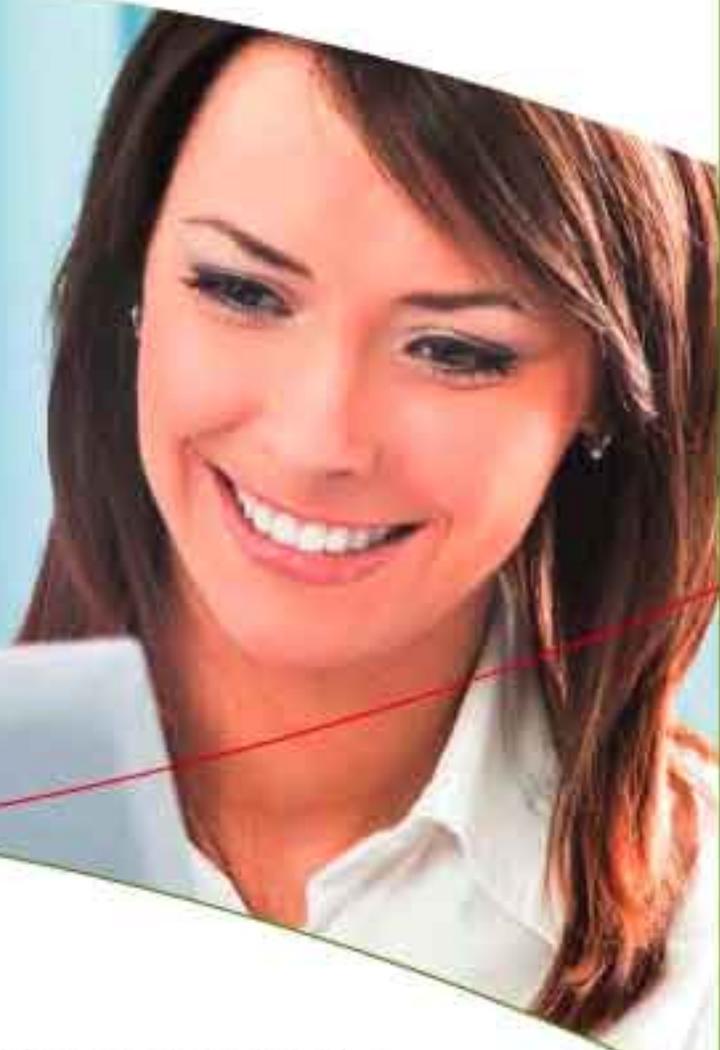
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Northern Virginia Chapter

Wishing You Well, Marcie Cedor!

Marcie Cedor has decided to leave Patton Boggs LLP and the legal industry after 25 years of service. She first began her career with Patton Boggs LLC back in 1985 as a legal secretary and most recently served as Director of Administration in the Northern Virginia office.

During her time at Patton Boggs, Marcie was able to experience a whole new world in the Middle East. For a period of more than five years, she traveled to Abu Dhabi, the capital city of the United Arab Emirates, where she worked for a client of the firm. While some would not feel comfortable traveling to the Middle East, particularly in light of our country's present state, there were no fears. "The culture is both exciting and challenging. One does not realize speaking the English language, the "business language of the world", is an extreme benefit living abroad."

For those of us in NOVA ALA Chapter, we remember Marcie and her take charge and good time's attitude. Marcie transferred from the D.C office of Patton Boggs in January 2000 to open their Northern Virginia office as the Director of Administration. Shortly thereafter Marcie joined ALA and the NOVA chapter and quickly became a board member. In 2005, Marcie became

the chair of the Vendor Program, now known as the Business Partner Program. Under her direction and guidance the program was revamped into what we have today. She brought many new partners to the table that has allowed the chapter to grow, offering members many more opportunities for education and scholarships to the association's regional and annual conferences.

In March 2007, Marcie took the role of President-Elect; little did she know that a month later she would step into the role of Chapter President due to then President Brenda Hanson accepting a position with another firm in her home state of Massachusetts. Without time to learn the roles as president, Marcie took on the challenge as well as maintaining her role as chair of the Business Partner Program. By the end of her presidency, the Chapter was awarded the Gold Level President's Award of Excellence by the association as well various distinguished awards. Marcie has served in numerous other positions on the board and committees for the chapter.

On behalf of the chapter, Marcie we will miss you and will fondly remember all the comic relief, good times and great contributions you made to NOVA ALA. ■■■



Renew Your Chapter Dues!

The NOVA ALA Board is pleased to announce that for the 3rd year, annual chapter membership dues will remain at the low cost of \$175. Please make checks payable to Northern Virginia Chapter ALA and mail to:

Attn:c/o Ben Sotelo, Treasurer
Firm Administrator
Vaughan, Fincher & Sotelo, PC
8619 Westwood Center Drive, Suite 400
Vienna, VA 22182

Member Profile: Ben Sotelo

Well if you haven't heard, Ben Sotelo will step back into the role of Chapter President beginning in March 2011. He has been the Firm Administrator of Vaughan, Fincher & Sotelo since joining the firm in March 2004. Prior to March 2004, Ben worked for a pharmaceutical research firm for sixteen years in a number of capabilities. Ben managed a medical research team on numerous projects for the Food and Drug Administration and over 40 pharmaceutical companies. He developed data warehouses for a Johnson & Johnson company in Honolulu, Hawaii; Denver, CO and Kansas City, KS. In addition, Ben had oversight of the company's computer facility and was involved in moving the company on two separate occasions.

Since he arrived in 2004, he assisted in completing the relocation of the firm to their Vienna offices as well as opening their newest offices in Leesburg, Va. In addition, he is involved in accounting, information systems, human resources and office services. What he finds enjoyable, is that Vaughan, Fincher and Sotelo is a small firm, allowing him to be involved in every aspect of the firm and the people. "Every day is different, it definitely isn't boring".

Ben became a member of ALA and the Northern Virginia chapter in 2004 as a way of transitioning into the legal environment at the request of the firm partners. In 2005, then president elect, Debbie Stickles offered Ben the position of chapter Treasurer. Since then, Ben has served in a number of roles: Vice President, President-Elect, 2008-2009 President, Region Representative and Business Partner Committee member.

Currently, Ben is also involved in planning a statewide retreat in March 2011 bringing together the Northern Virginia, Hampton Roads, Richmond and Western Virginia chapters for the first time since 2004.

Ben is a true native Washingtonian, born on Capital Hill. He is very familiar with the area, during his college years, he was a limousine driver. Every time someone needs directions, they call on him. Also, when friends and family are in town, he is giving them one of a number of tours he has developed. He is married to Christine, since 1998 and now lives in Centreville.

His hobbies include traveling (especially to the national parks on the west coast; Portland, OR and Las Vegas, NV) and golf. If at all possible, Ben can be found on one of the local golf courses on a Saturday afternoon with his wife and friends, then on Sunday mornings with the "boys" as Christine would say.

"I want to say that the ALA, the Northern Virginia chapter and its members are a very rich resource and have been very helpful in my legal career. It has been a pleasure meeting and working with all of the legal administrators in the area, especially those that have served on the chapter board and the various committees. I look forward to serving as your chapter president again"

Our Chapter Needs Help!

Many of our board positions are in need of assistance, especially our

- Website Committee and
- Newsletter Committee.

We have a GREAT Chapter and we need you to help keep it that way.

Email Jennifer - Kubal@hottell.com if you are interested.

Comments? Send Them to the Editor

We hope you have enjoyed the Northern Virginia Chapter's fourth quarter newsletter. Please let us know if you have any

questions and/or suggestions. Most important, let us know what you would like to hear about that would be helpful in your quest for success. We are here to provide that information to you if we can. Also we encourage you to use your membership to the fullest to assist you along the way.

Send comments and suggestions to:

Astrid at apw@mg-ip.com



Northern Virginia Chapter APPLICATION FOR NEW MEMBERSHIP

Please read the membership criteria on the reverse of this application; then complete the application, sign it, and send it together with your check to the membership director or appropriate officer of the ALA chapter in your area.

1. Name: First Middle Last
2. Employer: Address: City State/Province Zip
Email Address: Web Address:
Phone: Fax:

3. Check the most appropriate description of employer:
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Law Department of Non-Profit Organization
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Other (describe):
Government Legal Agency
Corporate Law Department

4. Indicate the number of lawyers served in the organization:
5. Area of firm practice(s):
6. Position Title:
7. Number of Years in legal organization:
8. I am the principal administrator of the organization: Yes No
9. I am a member of the National Association
10. I applied for membership in the National Association on: Date
11. A check for Chapter dues of \$175.00 is enclosed. (Dues are waived for Active Duty Military Personnel).

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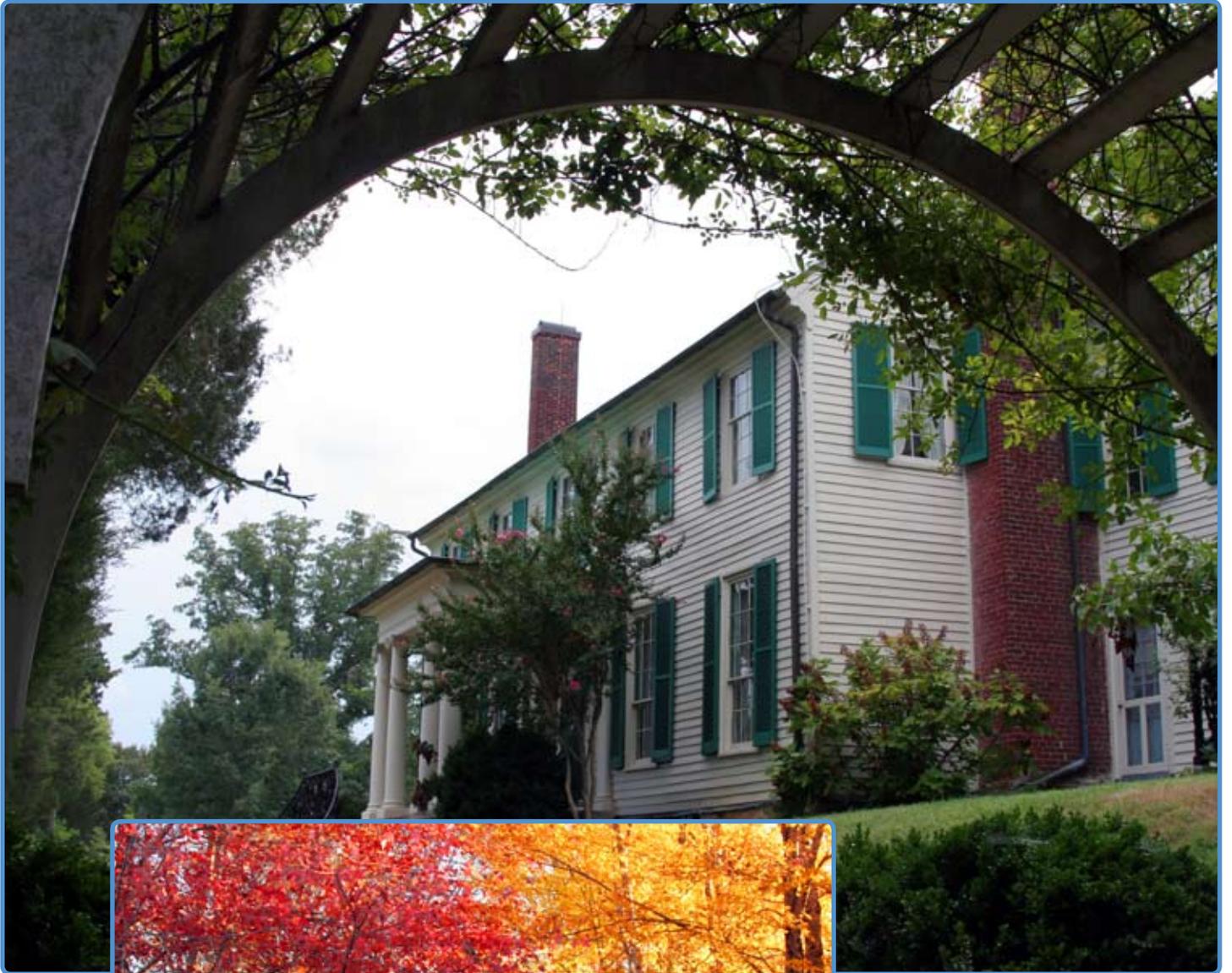
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