LEGAL MANAGEMENT

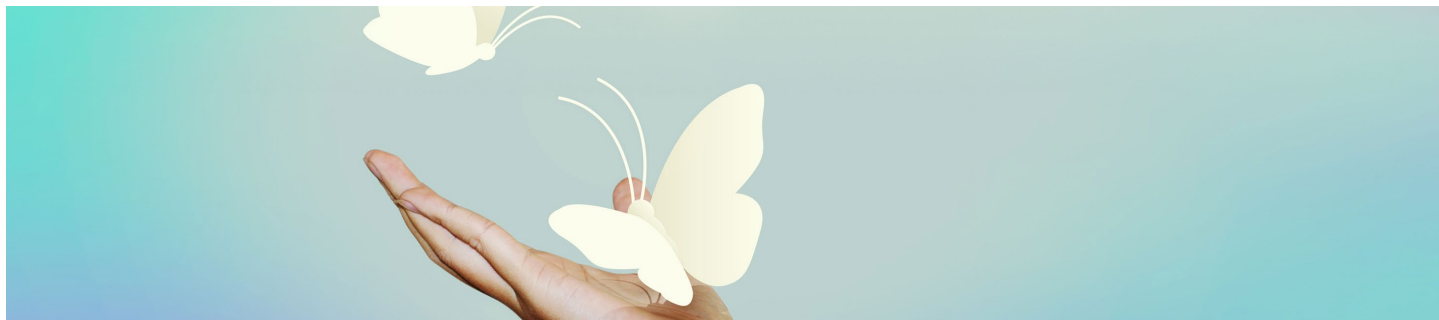## THE MAGAZINE OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

Leading Through Change

Now more than ever, legal managers will be asked to lead their firms through an unprecedented landscape. This CE course will explain how.

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*2020–2021 ALA President
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> " In a year of uncertainty, we are all looking at new ways to perform the usual, the normal and the necessary. And ALA is right there with you, and we will be here for you throughout this pandemic, tomorrow and alongside you every step of the way throughout your legal management career. "

Navigating This Extraordinary Moment Together

I am a planner, the self-proclaimed queen of lists. I have to-do lists, task lists, reminder lists, job performance lists, bucket lists, honey-do lists, packing lists, grocery lists — I have lists of lists.

I find comfort in the making of a list, solace in a spreadsheet. And I find excitement in checkmarks on a checklist. In the interest of full disclosure, I will admit I have been known to write an accomplished task on my to-do list so I can mark it off. So you can imagine what I started doing when I was selected as President-Elect of the Association: making lists.

The ideas started churning, I documented my thoughts and I began to plan. By January 2020, I had already prepared for receiving the gavel from President James L. Cornell III at the Association Luncheon during the Annual Conference & Expo. I had written my speech to present, purchased the suit I was going to wear and made my travel arrangements. I had checked all the boxes, and I was ready. However, something outside of my control happened on my way to Annual Conference, something I couldn't plan for, something I could never have imagined — COVID-19. And, just like that, all those plans I made no longer mattered.

We all found ourselves changing seemingly overnight. What was normal was no longer normal. What we thought was necessary and required, we found was no longer necessary nor required. No matter how well I had prepared for the next week, the next month or the next year, I found myself without a definitive plan. I found I had to give and go, had to jig and jag, and had to find a new way of accomplishing things.

It's always interesting to observe what happens when the proverbial crap hits the fan. Some cower, some run and some stand tall with the words "Bring It" emblazoned on their chests. As ALA members, we don't typically walk around wearing the hero T-shirts, or have capes around our necks flowing in the wind. However, we are made to stand tall; we are made of stern stuff that makes us run toward, not away, from challenges. We immediately start figuring out the next steps for ourselves, our staff and our firms, while reaching out to each other to see how we can help along the way. We have ALA — we are ALA.

The ALA resources (*alanet.org/covid-19*) surrounding COVID-19 are voluminous and timely. ALA staff has worked to accumulate a wealth resources available at your fingertips. Members have shared information on the Online Communities. Roundtables have been formed, webinars have been shared and all of you are stepping up.

As you know, there is a lot happening at ALA right now. We are maneuvering through the ever-changing landscape we all find ourselves in, while working to improve the professional lives of our members. We're also improvising new ways to deliver the content we've come to rely on ALA to provide as we search for an Executive Director to lead us into the next 50 years.

In a year of uncertainty, we are all looking at new ways to perform the usual, the normal and the necessary. And ALA is right there with you, and we will be here for you throughout this pandemic, tomorrow and alongside you every step of the way throughout your legal management career. While the last couple months have been beyond what any of us could have imagined, we are the quiet in the storm. We are the constant that our firms and employees are looking to and leaning on. I encourage you to never question the value you bring to those around you, especially in time of crisis. You are armed with the information you need and surrounded by cohorts to support you — ALA is here to help you be the best legal management professional you can be.

And so, it begins. I start my year as your President with my heart full and my head racing (which is better than the other way around). I am not going to pretend I have a roadmap and know where we are going — that would be foolish and insincere. Nor will I pretend that I have a list for what is ahead of us as an Association. I have been reminded that no matter how much one plans — or wants to plan — life has a mind of its own and we all best be prepared to not be prepared. The humility that this planner is learning daily will help me as I serve this Association. In all things I do, know that I am honored to serve with you and for you.

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TYLER CHANCEY
Cybersecurity Consultant
The Scarlett Group

" We have observed many cybersecurity-conscious clients become overwhelmed by the new challenges presented from a remote workforce. "

Working from Home? Here's Your Cybersecurity Checklist

Although many industries have been trending toward remote-only over the past decade, the global emergency caused by COVID-19 has been an unexpected catalyst for rapid change. The sudden shift to remote operations left many organizations unprepared for the realities of a 100% remote workforce.

In our experience, many organizations utilized their IT teams and consultants to great effect and have observed exceptional results from their workforce. We even have anecdotal evidence of *increased* productivity, collaboration and job satisfaction from many of our clients. However, this move has not been exclusively positive for companies. Whereas we anticipated the more obvious negative effects, such as lack of physical IT support, we have observed many cybersecurity-conscious clients become overwhelmed by the new challenges presented from a remote workforce.

This checklist will help you address some of these concerns.

ZERO-TRUST

Employers trust their teams to do their jobs to the best of their abilities using the tools provided. The attackers know this and make every effort to exploit the implicit trust given to employees by IT solutions. A newer trend in cybersecurity is the concept of "zero-trust." Basically, tools should be in place to verify that every action is being taken by the proper individual. Just because we see that John's account is active doesn't mean that John is the one behind the keyboard.

Solutions: A full zero-trust security model relies on the tried-and-true "principle of least privilege." Proper permission management is key — only give users the access that they require to do their job. Couple this strategy with a log-correlation engine such as a Security Information and Event Management (SIEM) solution to check user login locations, brute force attempts and other suspicious account activities. Always use multifactor

authentication wherever possible. The goal here is to use tools that provide a baseline for normal traffic and alert when something looks fishy while double-verifying everyone is who they say they are.

KEEPING ASSETS CURRENT

Patch management is critical during normal operations. Remote operations magnify the impact of unpatched devices because users are less likely to manually check for patches if the process is not automated for remote work. Ensuring that your organization keeps workstations, tools and software patched is critical in defending against potential threats.

Solutions: Generally, we recommend a remote management and monitoring solution that checks device patch status and pushes patches in an organized manner. Centralized reporting and compliance monitoring is critical, especially when it cannot be spot-checked physically.

BACKUP AND CONTINUITY

Many companies were forced into this current scenario without a real plan. Continuity planning can be a nightmare, especially with all the different factors to consider. Hopefully, this event has been a bit of a wake-up call for some companies on the importance of accounting for natural disasters. It is not unrealistic to have contingency planning for disastrous events. Use this time to ensure your infrastructure as a whole is properly protected and backed up. Disaster recovery is more than simply having a backup — you need to be able to get back online quickly after an incident.

Solutions: Disaster recovery as a service (DRaaS) is a newer trend in business continuity that not only ensures data is protected but also stores images of the entire network as redundant "hot sites." These services allow an organization to quickly recover from major incidents without having to rebuild the entire environment.

ENDPOINT SECURITY

Just as patch management is important to your endpoint security solutions, antivirus doesn't do much good if it's not running properly. Centralized management solutions are a great way to ensure that you are getting what you pay for with your security tools and allows IT to take proactive approaches in resolving persistent issues.

Solutions: Again, we will recommend a remote management and monitoring solution that checks device antivirus status and alerts IT should something go awry. Centralized reporting is critical for endpoint security. Sometimes an antivirus event can be an indicator of a risk that is much bigger beneath the surface.

USER FEEDBACK AND AWARENESS

Listen to your users. If they observe something fishy, accidentally click on a bad link or generally have issues with a security product, then it might be time for a change. Your IT team and users should be on the same team. Lack of awareness can lead to major friction between technical and nontechnical staff.

Solutions: Cybersecurity awareness training is vital for organizations of all sizes. Once users are trained, they know what to look for in a security event. Take all feedback seriously and create a system to check for incidents as needed.

Your Business Partners Are Here for You

As ALA members, you know your business partners are a valuable resource. In these unprecedented times, they remain here for you and your firms. We've compiled a list of resources they have available; they have essential information about how to handle the threat of coronavirus in the workplace. Just visit *alanet.org/covid-19* for access to these resources.

┌─ **ABOUT THE AUTHOR** ─────────

Tyler Chancey is a Cybersecurity Consultant with The Scarlett Group. One of his core job responsibilities is evaluating and architecting cybersecurity solutions in order to facilitate a stronger security posture both internally and within client's networks. His previous roles include extensive experience as a Security Operations Center Intrusion Analyst with a Fortune 5 company.

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> " Countless accommodations are currently being made to accelerate, accept and simplify remote communication and services. Many will remain in place long after this crisis is over. "

In the New Era of Remote Work, What's Your Best Technology Strategy?

The COVID-19 pandemic has had significant impacts on businesses across all sectors, with one of the most apparent being a massive shift toward remote workforces. As counties and states instituted stay-at-home orders, organizations experienced a corresponding and exponential increase in remote workers.

Was your business equipped to handle the new work-from-home norm? Many are struggling to scale their existing infrastructure to support their IT environment in a way not previously necessary.

With social distancing measures expected to last in some form for the foreseeable future, it's important to learn from those companies that have successfully handled the remote work migration to develop the best technology strategy to effectively support your remote workforce.

CLOUD TECHNOLOGIES TO THE RESCUE

Businesses have been experiencing varying degrees of success in accommodating this new working dynamic. The reality is that organizations that were already using cloud solutions to run their business have had it easier.

Cloud environments provide a key advantage to accommodating surge usage as they offer unrivaled scalability. When your business properly leverages a cloud solution like Microsoft Azure, you can significantly add or remove capacity without substantial advance planning. A company with an infrastructure previously sized for 40 remote users can triple that capacity in about 15 minutes by rebooting and enlarging the infrastructure to take advantage of Microsoft's readily available resources.

In contrast, organizations that are hosting their own environment may struggle to significantly expand their infrastructure. They must determine if their physical infrastructure can accommodate the unanticipated demand increase. Even if virtualized, workloads rely on an underlying physical plant with a finite capacity. This capacity will be stretched when under unprecedented demand even though instant scalability is crucial to continued operations.

Aside from purely computing solutions, there are many tools in the Microsoft stack that assist in simplifying scalability and reducing reliance on legacy systems. These tools allow organizations to expand function in addition to just capacity. One notable tool is Windows Virtual Desktop, which enables the deployment of a fully virtualized desktop within just a few hours. The cost of this service is limited to the underlying computing cost, and it can provide hundreds, or thousands, of remote desktops on demand.

File share services within Microsoft Azure allow organizations to provide file services to users and systems without necessitating an underlying server, virtual or otherwise. Similarly, Azure SQL Database and SharePoint Online offer the features of servers and server farms without the maintenance, management, security and cost associated with traditional on-site hosted services. The cost to run these tools is comparatively negligible as you're not paying for operating systems, servers and ancillary tools such as antivirus controls and management.

Azure Traffic Manager (ATM) can provide access to systems whether hosted on premises or in the cloud without the demands of traditional load-balancing or domain name system (DNS) management. Workloads serviced by ATM will invisibly direct users to wherever the active service is running. This can be leveraged for migrating services to the cloud or just for resiliency.

IMPLEMENTING CHANGES

These are just a few examples of the power of today's cloud. The good news is, even if you're not currently operating within it, the tools outlined above are still accessible. The only barrier to being "in the cloud" is making the decision to use cloud-based tools. Within a few hours, a virtual private network (VPN) tunnel can be established, allowing the cloud to function as an expansion of your existing organization.

By incorporating cloud-based tools, you can access nearly limitless data and computing capacity that was unavailable just hours earlier. The only true prerequisite is connectivity — you can't access cloud solutions if you can't connect to them. This is no different than your current connectivity requirements.

If your connectivity fails, you lose all access to your data and the ability to perform critical business functions. Reliable and resilient networking demands redundant communication paths and infrastructure to support data communication, whether that data is stored within the cloud or on your servers.

LOOKING AHEAD: THE NEW NORMAL

There's no question that the COVID-19 pandemic has forced businesses in all sectors to leverage technologies in new ways. From finance to education to medicine, remote access and connectivity have become the new norm.

The upside of this shift is that people are increasingly more comfortable operating when remote. What was once largely the purview of younger generations and traveling executives has quickly become the new default for today's businesses. There will likely continue to be labor law constraints and physical requirements that will limit some roles to in-person, but we are likely to see an increase in remote workforces in areas that previously were unthinkable, even after the coronavirus pandemic passes.

Countless accommodations are currently being made to accelerate, accept and simplify remote communication and services. Many will remain in place long after this crisis is over. Remote work will be ingrained as the new default. The changes your organization makes today will continue to pay dividends far into the future.

┌─ **ABOUT THE AUTHOR** ─

Eli Nussbaum is a Managing Director at Keno Kozie Associates. He joined the firm in 1998 as part of its Y2K audit team. Nussbaum then became a full-time engineer, holding every position within the department before taking on an account management role. During his tenure with Keno Kozie, Nussbaum has focused on physical, virtual and cloud infrastructure design and implementation for both infrastructure and client environments.

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Leading Through Change

Now more than ever, legal managers will be asked to lead their firms through an unprecedented landscape. This CE course will explain how.

COURSE DESCRIPTION

It's a cliché, but it's true: Change is constant. With the COVID-19 pandemic, we're reminded how dramatically things can change overnight. Legal managers who are well-versed in change management can minimize the negative impact and move the firm forward. By leveraging change management techniques and tools, leaders can help the process of change be more positive, purposeful, collaborative and successful for everyone.

COURSE OBJECTIVES

1. Identify the four truths about change.

2. Recall why humans tend to resist change.

3. Examine the role legal managers play in bringing about change to an organization.

4. Review how to create a strategic charter.

5. Recognize the four change management plans.

At the time this article was authored in March 2020, the world was in the midst of a global health crisis that was also producing a global economic crisis. After devastating China and parts of Europe, cases of COVID-19 were on an alarmingly rapid rise in the United States and more than two-thirds of the U.S. population were under state orders to stay at home in an effort to keep the disease from spreading too fast. Businesses were shuttered, schools closed; people were out of work or working remotely from home; high-risk individuals were in isolation.

People were dealing with extraordinary personal and professional changes while health experts and government officials scrambled to lead the country through this unprecedented set of circumstances. While many lessons are yet to be learned and

history will look back on this period with plenty of enlightened criticism for leadership and society alike, change management experts are able to observe real-time examples of how leaders have both succeeded and failed at managing the people side of unprecedented change.

This article begins with four truths about change that are evidenced by people's responses during the coronavirus pandemic and that can be translated into lessons for law firm leaders who want to better understand the practice and fundamentals of change management.

FOUR TRUTHS ABOUT CHANGE

1. Change is a process. Change has to be managed to succeed. Transformation studies over the decades suggest that nearly three-quarters of change initiatives fail to realize their planned benefits or that they are abandoned before completion. And while many factors will contribute to an unsuccessful change project, often the No. 1 obstacle is employee resistance and the ineffective management of the people side of change.

As displayed by the national and local change efforts during the spread of the coronavirus, change is a process. Leaders can't flip a switch and make a big statement and expect that people will follow. When people were initially asked to "socially distance," most didn't comply, believing that the warning either didn't apply to them or wasn't important enough to put up with the inconvenience of it. It took several days and weeks, along with forced orders and shutdowns, for people to widely adopt the request. The more leaders understand the human factors at play and recognize that people react, process and ultimately buy in to change at their own pace — and are driven by their own motivators — the more successful they will be.

The process of change can be measured at the organizational level and at the individual level. Given that an organization is nothing more than a group of individuals, it's the latter that will determine the former.

There are several change models professionals might consult to account for the individual process of change. A simple and easy one to remember is the Kübler-Ross Change Curve, which stems from Elizabeth Kübler-Ross's Five Stages of Grief. This describes the emotional stages people go through when processing change. It makes sense that humans process change in a way similar to how they process losing a loved one: the beginning feeling of shock, followed by denial, frustration, depression, experimentation, decision and finally integration — in other words, living the new normal.

In any change model, researchers cite a dip where people are at their lowest morale and productivity — the depression stage,

according to Kübler-Ross. This dip is more commonly referred to as the "Valley of Despair." This is the stage where businesses see a drop in performance but an increase in cultural and behavioral issues and employee absence due to stress and illness.

When leaders effectively plan for the people side of change and factor the individual change process into the bigger picture, they can minimize the negative impact and duration of the Valley of Despair. By leveraging change management techniques and tools, leaders can help the process of change be more positive, purposeful, collaborative and successful for everyone.

2. People have an emotional, human reaction to change. Everyone knows that change is hard and uncomfortable. In the case of COVID-19, all changes have been hard and uncomfortable — some to the extreme. The backdrop for these changes is a scary one; it's certainly can be difficult to find many positives in this.

But if one looks, there are some unexpected positive outcomes: professionals becoming more adept at working remotely; working parents and school-aged children having more time together; people placing more interest in humanity than in the day-to-day grind of work; and increased community-building through creative means.

When planning organizational change in law firms, it is important for leaders to acknowledge and reinforce that while change can be uncomfortable and often hard, it also comes with positives. Some people will perceive change to be a welcome relief to a negative situation; others might find change to be an injection of energy, hope and excitement into their status quo. And for others, change might be a blessing in disguise that only becomes apparent after the fact.

One universal truth about change is that **people don't mind change as much as they mind being changed.** When people feel like they have no choice or control, they will have a negative reaction that could set the course for change into an irreversible

down curve. The more people feel their rights are being taken away, the more they resort to fear, anger and resistance. Therefore, another critical area of planning and execution for change leaders is communicating in ways that demonstrate how people will personally benefit from the change and offering ways for people to participate, have a voice and control the things they can control.

3. In the absence of information, people make stuff up.

Another universal truth to change is that people do not like to be surprised. Most people prefer predictability and stability. When faced with changes to the status quo, people experience fear, uncertainty and doubt (or the FUD Factor). After all, it is human to fear the unknown. When people receive inconsistent, vague or misleading messages about what is happening and what to expect, they can go to a dark place and assume worst-case scenarios.

Consider the rumors and mixed messages that have spread since the coronavirus pandemic began. Health professionals have said one thing, government officials have said other things, and the two haven't always been aligned. And suddenly toilet paper went from being a commodity to a highly coveted essential item. Yet no leader ever suggested that toilet paper would be affected by the coronavirus or that people should expect to need a large supply of it on hand. People made that up.

Confidence and trust come with understanding. This is why clear, consistent, open and compelling communication is a change leader's most important job. Leaders must communicate the truth about what is known and unknown, and they must be aligned and consistent. Furthermore, communication should come in terms people can understand and personally identify with. The use of storytelling and visual references helps to make complex or difficult information easier for people to process and act on.

For example, many people in the United States who didn't fall into the high-risk categories for contracting a severe case of COVID-19 did not understand or appreciate why they should socially distance or avoid going about their daily routines. Then, flatten-the-curve imagery and concepts went viral through memes on social media and news outlets across the country. The brilliance of "flatten the curve" is in how it very simply illustrates the why behind the changes people were being asked to make. And while this alone did not compel everyone to change, it certainly did motivate many people to make the changes that were asked of them. That image gave people a way to easily talk to others about why these individual changes were important to the greater society. **To change behavior, people need to understand the personal gain and pain that results from changing versus not changing.**

4. Change is constant and isn't going away. If you look back to just January, this insight could not have been truer. Since the coronavirus outbreak hit the United States, Americans have been inundated with changes on a near daily basis, with little sightline into when life will return to normal and whether the then normal will be vastly different from yesterday's normal. Yet people are beginning to cope with constant change and have built a sense of resilience for adapting to whatever is the next disruption and change.

Law firms would do well to take a page out of the Centers for Disease Control and Prevention's (CDC) pandemic playbook when it comes to rolling out large-scale change in smaller incremental measures. For example, the CDC likely knew that schools would need to be closed for an extensive period of time. But rather than coming right out and closing schools for three months, leaders began with two weeks and then added another two weeks and so on. By the time parents began to realize what the CDC already knew, they had already been forced to establish new routines for working from home while caring for their children. This made them more able to psychologically cope when the fuller picture came into focus.

While organizations hopefully won't face crises like the coronavirus on a regular basis, it is safe to say constant change is already here and will only increase for organizations. The more leaders can create an organizational competency (or playbook) for change, the more internal and external stakeholders will not only accept firm changes but will also ultimately want to contribute to the success of a more nimble and responsive law firm.

UNDERSTANDING YOUR ROLE AS A CHANGE LEADER

Organizational change requires a coalition of leaders who are invested in seeing the change initiative through to the end. The most successful changes will be spearheaded by an executive sponsor who carries a high degree of influence across the firm's multiple stakeholders. This person will cast the vision, sponsor the charter and be the highest promoter of the effort, while building a coalition of other leaders and influencers at various levels across the organization.

In addition to the sponsor coalition, there is a specific role for managers/practice leaders who will provide representative input to the change process while serving as an advocate, coach and mentor to the people they lead. And, finally, a change project will require a change manager who's responsible for developing and managing the execution of key change management plans that will produce the desired and perceived benefits of change adoption.

CREATE THE VISION AND STRATEGIC CHARTER

A change initiative without a strategic charter is doomed to fail because it indicates that firm leaders have not thought all the way through the vision, purpose and impact of the change. That could mean that this is not the right change to be making, or at least not right now. Leaders may use the following questions to guide their design process of the vision and strategic charter, which will need to be clearly communicated to internal, and possibly external, stakeholders:

- Why change? What happened? Why now?

- Where are we going and why there?

- How will our people be impacted and involved?
  - » What change(s) will they experience?
  - » How will they benefit from the change?
  - » What is important to them?
  - » How will it be hard for them?
  - » What happens if they do
  - » How can people participate in the change process?

- What will be our detractors?
  - » What needs to happen before we can fully execute our vision?
  - » What else is changing and impacting our people and resources?
  - » What client and/or market forces will present challenges?
  - » Where do we anticipate internal pockets of resistance?

- What does success look like?
  - » What needs to have happened by what time for this to be considered a success?

DESIGN THE CHANGE MANAGEMENT PLANS

The following four change management plans are blueprints for how the change will be communicated, supported and reinforced throughout the firm. They are geared specifically toward managing the people side of change. Often, these plans will overlay project management plans that focus on the logistics, timing and execution of the change implementation itself.

A **Communication Plan** maps key messages from firm leaders and influencers to various stakeholder groups, along with the planned communication vehicles, drafting, approval and timing for each message. Communication is often the item people point to in hindsight when asked why a change effort

was a negative experience. Therefore, proper communication planning and execution is incredibly important and each communication should be thoughtfully constructed and tailored in a way that helps people to best receive the intended key messages.

People want to understand the big picture and the "why" from the executive sponsor and leaders of the firm. And they want to hear the specific benefits (WIIFM — what's in it for me?) from the person who manages them and understands their day-to-day better than others in the firm. Furthermore, people prefer and will respond better to face-to-face and personalized communications than to impersonal emails. A good communication plan incorporates a variety of modalities to provide clear and compelling communication that creates buy-in, motivates people to take action, sets expectations and encourages feedback.

A **Training Plan** outlines the required skill-building and knowledge-sharing across the firm. Training can be implemented in a variety of formats, including in-person facilitated sessions, virtual live events, recorded on-demand videos and self-guided learning. The training plan should map out the various types of training that will be available for different stakeholder groups and account for logistics, efficiency, effectiveness and desired outcomes.

A **Coaching Plan** equips key leaders to coach and mentor the people they lead. Organizational change happens one person at a time and can make a large-scale change project feel overwhelming, particularly in a large organization. The larger the organization, the larger the coalition for coaching and mentoring will need to be. While change acceptance happens at an individual level, so does change resistance. Leaders need to spot and manage resistance within their stakeholder groups, advocate for the change, set a positive example and help people through the process at an individual or small-group level.

MANAGEMENT PLAN

A **Momentum Plan** guides the reinforcement of the reasons for change, tracks successes against an established scorecard, communicates positive results and identifies opportunities for continuous improvement. Often, there is a lot of energy and communication at the beginning of a change initiative that slowly tapers off as sponsors and leaders get busy with other priorities. It's important to keep the momentum going until adoption and performance goals are reached, which may be a rolling timeline.

Furthermore, leaders need to recognize when people have slipped into their old ways even after initially demonstrating adoption of the change. Therefore, reinforcement and continued check-in, training and coaching is important sometimes for several weeks or months afterward depending on what the change is and how easy it is for people to work around it. To reinforce the positive outcomes produced by change, leaders should celebrate and share early wins and tell success stories of how the change has made a positive difference for attorneys and clients.

CREATING A FIRM COMPETENCY FOR CHANGE

There is no better time than now to commit to creating a competency for change. Each time change is implemented ineffectively, people add it to their banks of learned failure as another example of how change is hard. Learned failure or success happen when people have repeated experiences of failures or successes and they come to learn and expect more of the same. These experiences imprint in people's memories and cause them to go into the next change with either a greater sense of trust and confidence in the leadership, or with a greater sense of dread and skepticism.

Leaders will find that each change success breeds less resistance for the next change. By continuing to follow change management principles leaders create conditions for people to buy-in and be successful. As a result, the firm will eventually develop a core competency that enables it to be agile, nimble and change-ready in times of crisis as well as in times of opportunity.

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" With a growing amount of the workforce consisting of employees who have parents in that age group, many have found themselves trying to balance work with caregiving responsibilities they've assumed for a parent or older relative. "

Handle with Care

For employees who are struggling to help an ill parent or family member, employer-provided support can be a game changer.

Throughout the past year, Sonia Menon, Chief Operating Officer at Chicago-based law firm Neal Gerber Eisenberg, had begun to hear employees make remarkably similar comments — all involving ill family members they were trying to help take care of.

One firm member was hoping to check in on her elderly mother, who wasn't well, every day. An attorney getting ready for a trial had a parent who needed hip surgery. Another employee was preparing to move in with his father, who'd been diagnosed with cancer.

"Stories started to pop up more and more — just struggles people were having," Menon says. "Maybe they had kids at home and a parent with health issues and had to manage it. We do such a great job supporting women when they go on maternity leave; we thought we should talk about this and what we can do to support our colleagues."

Since January, the firm has offered its approximately 300 employees access to Homethrive, a company that provides care management coaching for individuals who have aging loved ones — which can range from identifying a medicine delivery service or a specialist to helping firm members navigate difficult conversations about a parent's living situation.

"We understand this population of our parents who are having health and other issues want to be independent so they don't put stress on their kids," Menon says. "A lot of our employees have parents out of state; [we wanted to determine] how to get to a point where we're providing the physical and emotional support they need."

THE NEW NORMAL

In the past 10 years, approximately 10,000 Baby Boomers a day have turned 65; 47% have two to three chronic health conditions, according to U.S. Department of Health and Human Services data.

With a growing amount of the workforce consisting of employees who have parents in that age group, many have found themselves trying to balance work with caregiving responsibilities they've assumed for a parent or older relative.

In March of this year, additional workforce members may have needed to take on a caregiver role to help run errands for elderly and other at-risk family members so they could self-isolate as a coronavirus safety precaution.

Dozens of law firms allowing employees to work at home — as of late March, more than 60 BigLaw firms had closed offices and/or encouraged remote work, according to a Law.com tally — likely helped some fulfill newfound caregiving needs.

Hoelscher Gebbia Cepeda PLLC in San Antonio, Texas, which currently employs four attorneys and four staff members, transitioned to a work-from-home structure in response to COVID-19 concerns, according to Managing Attorney Joseph Hoelscher.

"Stores are giving priority to older shoppers with special hours, but for elderly relatives who can't go shopping, just getting groceries is a problem," Hoelscher says. "Because we've now gone fully work-from-home, caregiving isn't an issue, really. Basically, people are working whatever hours they want, as long as it gets done."

Employees providing care for older family members, Hoelscher says, has become a more frequent occurrence in recent years. "Over time, people stopped taking sick leave for themselves or to take care of kids; it became taking care of a parent or relative," he says. "It seems to be a common Generation X experience."

With the hours legal industry members can log, ongoing caregiving needs can pose a problematic time crunch.

Caregivers may need to reduce their work hours or ultimately leave their job because they're often focused on their loved ones' health. Caregivers also tend to neglect their own, according to Drew Holzapfel, Convener for ReACT, a coalition that works to address challenges employee caregivers face and the impact on employers. It's a membership-based group, but there's no cost to join, according to Holzapfel.

"They're more likely [than noncaregivers] to experience everything from chronic pain to fatigue," Holzapfel says. "Lower health outcomes mean increased costs for employers — certainly absenteeism and presenteeism. This hits productivity, health care costs — there's definitely an impact to the employer, and people who are caregivers also have generally lower financial outcomes."

Hoelscher Gebbia Cepeda has found enabling caregiving has helped the firm attract highly qualified candidates — including ones working for competitors who want to jump ship.

In response, some organizations are offering assistance to help reduce the strain employees can feel from balancing caregiving and work responsibilities, ranging from on-site professionals who'll sit down to discuss care-related options with employees to increased insurance for family members, Holzapfel says — and on-demand support like Neal Gerber Eisenberg (NGE) is offering.

Within two and a half months of its care program launch, a number of firm members had already reached out for assistance or signed up to receive information, according to Menon.

"At least five people have told me, 'This has changed my life,'" she says. "People are more appreciative of it than we ever expected."

HOW FIRMS FACILITATE CARE

In addition to remote work opportunities, law firms also utilize flex-time arrangements to help employees meet caregiving needs. A ReACT analysis found both options offer a return on investment of about $4 for every $1 spent, according to Holzapfel.

In addition to employees taking time allotted under the Family and Medical Leave Act to care for a relative, NGE has a remote work policy and will adjust employees' schedules, according to Menon.

"It's harder for nonexempt employees; they have to be here from 9–5," she says. "We see more of a leave option [with them]. [But] if something were to happen, we would make it work by covering shifts."

Hoelscher's firm employs a similar approach. Firm members can use paid sick leave time to care for relatives, take advantage of flex scheduling or work remotely.

Because caregiving needs can arise quite suddenly, proactively informing employees about what benefits are available may help increase utilization.

When one of the partners recently transitioned to a part-time schedule to care for his father, other firm members helped complete his work obligations, Hoelscher says. While pet-related leave isn't a standard policy, another employee was able to take time off when her dog became seriously ill.

"It became apparent the dog was going to need very expensive surgery; we gave her time for that," Hoelscher says. "She ended up being out over the course of two weeks. She tried to come back in a couple of times; we just pitched in to cover for her."

The firm's habit, Hoelscher says, is to not really question specifically why employees are out of the office for caregiving. However, the firm has the right, per its employment agreement, to ask for documentation if concerns arise — and being unable to prove a reason for taking time off could be grounds for termination.

"We try to be polite about it, [but] we've had people we felt were abusing it before," Hoelscher says. "Both times, we said, 'What's going on? If there are excessive [circumstances], what do you need? How we are going to move forward? Because right now, it's not sustainable and is affecting your work.'"

Provided it's not misused, a policy that helps employees provide care can be a prized benefit. Although when ReACT was formed a decade ago, most of the C-suite members it initially spoke with said elder care needs hadn't had a huge impact, in the last five years, Holzapfel says that sentiment has changed.

"Companies realize it's an issue; they're looking at ways to respond," he says. "The tight labor market is also a contributing factor. They're looking at how you can attain and retain employees, what employees are doing outside of work and what makes a great workplace."

"Companies realize it's an issue; they're looking at ways to respond," he says. "The tight labor market is also a contributing factor. They're looking at how you can attain and retain employees, what employees are doing outside of work and what makes a great workplace."

Hoelscher Gebbia Cepeda has found enabling caregiving has helped the firm attract highly qualified candidates — including ones working for competitors who want to jump ship.

"It's not because of the pay, because they're better compensated there," Hoelscher says. "It's because they've reached a point where they have some kind of family problem, and their employer is not letting them address that. It has become a recruiting thing for us; people are coming to us because they want and need flexibility."

PLANNING CAREGIVING POLICIES

Although firms may assume employees hope they'll provide financial assistance, access to vetted financial and other support sources is actually caregivers' No. 1 request, according to a survey ReACT conducted.

"Finding a service provider is exhausting and time-consuming," Holzapfel says. "All care is local, so if you're a law firm that has 1,000 lawyers in 15 different cities, there isn't a national caregiver roadmap you can give out. You need to have resources in Chicago [and other cities]."

If a firm wants to provide additional protection against the costs associated with ongoing care-related services, it can consider offering long-term care insurance for employees' family members or firm employees in case they need care due to injury or illness.

Robyn Leonard is a benefit adviser at LTC Solutions, a brokerage firm specializing in employee long-term care insurance benefits; they are also an ALA VIP business partner. She suggests checking how many health questions participants have to answer to qualify for a plan (she notes some allow new hires to sign up without any) and looking for an option that provides enough to live on if care is only needed for a brief time.

"We recommend what we call a short, squatty plan versus a tall, thin plan," Leonard says. "For example, a benefit that pays $200 a day for two to three years we feel is better than a plan that pays $100 a day for six years or [an] unlimited [period]."

To ensure the caregiving-related services your firm offers are providing the most value, Holzapfel suggests regularly gauging employee sentiment.

"The process should be survey [employees about what they want], offer [a service, then] survey [them about its effect]," he says.

"One employer told us it was offering a crisis hotline for support, and the phones were quiet. They switched to an option where you could text as well, and utilization went through the roof. With open [office] plans, people can't just call and hash it out over the phone — they'd rather text for privacy."

Because caregiving needs can arise quite suddenly, proactively informing employees about what benefits are available may help increase utilization.

"We have a member who said, 'You have nine months to prepare to have a baby and about nine seconds to prepare to be a caregiver,'" Holzapfel says. "Making sure people are aware of resources that are there to support them will reduce the impact of the crisis."

Educating supervisors about how they can support caregivers will also help employees take advantage of the resources you provide, according to Holzapfel.

"Another big barrier is how frontline managers respond," he says. "We somewhat celebrate young parents — you can dash out of a meeting if you say you've got to get your kid to a soccer game — but we don't have the same situation when you have to provide elder care."

That's unfortunate because, as Hoelscher says, when employees are burdened with caregiving concerns, they — and their work — can suffer.

"If they're wondering how to take care of their dad, the stress is still with them and they're not performing," he says. "If people can take care of these things in their personal lives, they can come to work and focus."

A number of organizations have put programs into place that are successfully helping employees address caregiving needs, according to Holzapfel. Others haven't, but he says they may find they eventually need to.

"The demographics show this is a growing issue," Holzapfel says. "We're living longer, with age-related chronic conditions; we're working longer — all of this is going to impact the need for elder care. Ultimately, you want to be able to support professional and personal demands. That's just good for your bottom line — and good for the employee."

┌─ **ABOUT THE AUTHOR** ─

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Succession Planning: Protecting Your Firm's Financial Future

As we all adjust to a new way of life in the midst of the COVID-19 pandemic, it's never been more apparent that having a continuity plan is vital. At its core, succession planning is a strategy for passing on leadership roles in the event of either an unanticipated or an inevitable life event.

> "Your implemented plan can help preserve the loyalty and support of employees, clients and creditors during and after the ownership transition — an incalculable value that will certainly affect the firm's financial future immeasurably."

While knowing to whom a role will pass in the wake of one of these events is key, it's not sufficient. There is a financial aspect that must be addressed in order to ensure that the firm will be able to maintain operations going forward.

To that end, there are three main categories of succession events your firm should be prepared for: voluntary departure (i.e., retirement), death and disability. In a complete succession plan, you firm must address each of these categories and their corresponding financial needs.

VOLUNTARY DEPARTURE

This is succession planning in its purest form. There are many items to be address in a voluntary departure, but from a financial perspective these items are relatively simple. The departing partner will need to be able to replace their income in order to leave. The firm's role in this part of the planning centers on 401(k), profit-sharing, and top-hat plans to assist in preparing for the departure.

Transfer of ownership interest also needs to be addressed, as well as any potential residual income from client relationships that were developed by the departing partner. The firm should also detail these items in the partnership agreement well in advance of an actual departure to ensure everyone knows what will happen at the separation date.

DEATH

The unexpected passing of a partner causes a host of issues that need to be dealt with at a time when the survivors are often emotionally compromised. Planning for these events in advance will help alleviate much of the stress.

From a financial perspective, the firm must replace the income previously generated by the deceased partner, as well as potentially fund a buyout of the individual's ownership interest and equity position. This is most often addressed with life insurance.

There are many types of life insurance that can be used, each with benefits and drawbacks. We recommend using the services of a life insurance agent who is familiar with the ins and outs of succession planning to avoid making mistakes in setting up the policies — both in providing the correct amount of insurance and the administrative setup. The most common error we see when implementing these types of life insurance policies involves not setting up the ownership of the policies correctly. An incorrect setup can cause the proceeds of the policies to be taxable, whereas a proper setup will make the proceeds tax-free.

DISABILITY

Many of the same issues associated with the passing of a partner exist in a situation where a partner is disabled and no longer able to perform their duties. The financial concerns surrounding disability are typically funded with disability insurance. There are several types of disability policies, including:

- Policies that address the income of the disabled person

- Policies that replace the income for the firm that the disabled person generated

- Policies that provide assets for the firm to buy the disabled person's equity

Once again, the ownership of these policies is key, as well as a separate buy-sell agreement in the case of an equity buyout to avoid tax and other common pitfalls.

YOUR FIRM'S FINANCIAL FUTURE

Protecting the firm financially means ensuring that the equity partners who remain following a succession event can not only retain control of the firm but also maintain financial viability without interference from a departed partner's family or estate. A solid succession plan will allow you to enact a prompt transfer of the departed partner's interest at a fair price.

Moreover, beyond the immediate financial needs a succession plan should address, your implemented plan can help preserve the loyalty and support of employees, clients and creditors during and after the ownership transition — an incalculable value that will certainly affect the firm's financial future immeasurably.

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> Set up filters in Gmail or Outlook to automatically sort emails into categories for response. Again, if you can respond quickly, go ahead and respond ASAP.

It's Time to Clean Your Email Inbox

Since we have been quarantining, we have found extra time to do some digital housecleaning. As we practice social distancing, it's is a good time to start thinking about cleaning up our clutter.

Your email inbox is a good place to start. There are many methods for clearing it out. Here are some of them.

OLD-FASHIONED METHODS (MANUAL CLEANUP)

There many methods for manual cleanup. It seems that, like opinions, everybody has one. The question is, though, which ones actually work? We'll try to summarize and synthesize them here — in other words, we'll try to "declutter" the methods for you. The first step is to delete the items that are clearly trash at the outset. One easy way to get this done is to sort your email inbox by sender. Simply delete social media messages, retail ads, past event reminders, delivery confirmations, out-of-date newsletters, etc. Then sort again by subject line and do the same thing. In other words, delete the emails from senders or with topics whose messages are no longer important.

The next step is to clean out your oldest messages. Start with the oldest unread messages and deal with them. Then go to the oldest messages that you have already read and responded to. If they are no longer needed in your inbox, archive them and/or put them into folders by category.

Speaking of folders, the next step is to create folders and labels that apply to topics or senders that have several messages that would fall into the same category. But be careful — creating too many categories will defeat the purpose. Add "labels" or Outlook "categories" to further organize each folder. Then create an "on hold" folder for emails that you cannot decide whether to keep, act upon or file. Work on this folder when you are on a break. Do not keep the items in this folder for more than one week.

Now, you should be left with only emails that need action. If you can act on the email in two minutes, go ahead and "git 'er done." If you need more time, add it to your to-do list and send yourself a notification to remind you to do it.

The last step is to keep the clutter from coming back. Set up filters in Gmail or Outlook to automatically sort emails into categories for response. Again, if you can respond quickly, go ahead and respond right away.

Of course, Bill insisted that we include advice from his hero, organizing consultant Marie Kondo. Her steps are as follows. First, tidy your home. This will heighten your sensitivity to joy and help you learn to choose what is valuable to you. Then start on your digital cleanup, which must be done all at once. Fully commit yourself to tidying. Then begin making decisions. First, does the email "spark joy"? If the answer is yes, put it into a "spark joy" folder. Then, create an "important documents" folder and put the emails you need to keep in that folder. Delete the rest.

Stop keeping *komono* — what Kondo calls items we keep "just because." If the item is not important or doesn't "spark joy," thank it for its service and let it go with gratitude. Then begin to organize the rest into folders. Keep the folders simple. Kondo recommends only "saved" and "unprocessed." Use the search function to find emails you are looking for. Delete or archive emails when you are finished with them, but, again, thank them for their service.

THE HIGH-TECH METHOD (LET THE COMPUTER DO IT FOR YOU)

There are several digital tools available to help spring-clean your email box. Here are some of them.

ZERØ Email Management Software: We have not tried this one yet, but we are intrigued by it. We are certainly going to order a demo of the app and try it out. ZERØ supposedly applies "artificial intelligence [AI] and smart automation" for an email management solution designed specifically for lawyers. Allegedly, it automatically analyzes your emails together or individually and automatically files them by client. It works on mobile devices, desktops and laptops. It also tracks the time you spent on the email, assigns it to a client and creates a matching time entry. We'll see if it works.

Mailstrom: This is another tool that supposedly uses AI to help you clean out your inbox. It "guesses" what you think is important and then identifies bundles of emails that you can deal with as a group. It also allows you to block or unsubscribe to unwanted emails with one click.

Cleanfox: This tool works with all messaging providers and apps. It finds all the newsletters you receive in your inbox, sorts them by criteria (such as whether you open them or how long you look at them), and recommends deleting or unsubscribing.

SaneBox: This is a great tool that has been around since 2010. It works with you and your habits to identify important messages, will stop emails when you trigger "do not disturb," will get rid of annoying senders and will remind you to follow up. You begin the process by giving SaneBox access to your entire inbox, whether it's Outlook, Gmail, iCloud or any other provider. It will then determine what emails are important by analyzing whether you open them, how long you look at them, and whether and how quickly you respond. It doesn't look at the content of the emails but nevertheless decides what is important based on your behavior. You go to your inbox for the important emails, whereas the others are moved to a "SaneLater" folder for you to deal with later or trash.

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William Ramsey, Partner at Neal & Harwell, and **Phil Hampton,** Consulting President of LogicForce, are best known for *The Bill and Phil Show.*

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> " Other than for childcare-related reasons, employees may not use EPSLA and EFMLA together for any COVID-19-related reason. "

Your Guide to the Temporary Rule on the Families First Coronavirus Response Act

This article is a summary based on the U.S. Department of Labor Q&A and temporary rule published as of the date of this writing.

On March 18, 2020, the Families First Coronavirus Response Act (FFCRA) was signed into law. The FFCRA includes, among other provisions, two laws that provide workers at organizations with fewer than 500 employees and covered public sector employers with paid, job-protected leave for specific COVID-19-related reasons.

Specifically, the Emergency Paid Sick Leave Act (EPSLA) offers workers up to 80 hours (or two work weeks) of paid leave, and the Emergency Family and Medical Leave Expansion Act (EFMLA) provides eligible employees up to 12 weeks of paid leave due to school/childcare closures and unavailability caused by COVID-19. An overview on the specifics of these laws can be found here.

The U.S. Department of Labor (DOL) has issued a number of guidance materials to assist in the implementation of these laws, including a Q&A and a temporary rule. The following is an overview of the points highlighted in that document:

1. Private sector employers that provide EPSLA and/or EFMLA are eligible for refundable tax credits and must retain documentation for such credits. Documentation must be retained for four years, whether requests are granted or denied.

2. Employees taking EFMLA and teleworking employees taking EPSLA may take leave intermittently if the employer agrees.

3. Employees working at their usual worksite may take intermittent EPSLA only if it is to care for the employee's child whose school/day care is closed or if childcare is unavailable, and only if the employer agrees.

4. If an employee is laid off or furloughed, the employee is not eligible for EPSLA or EFMLA during the layoff or furlough.

5. If an employee's scheduled work hours are reduced, the employee may not use EPSLA or EFMLA for the hours they are no longer scheduled to work.

6. Employees may not collect unemployment while receiving EPSLA and/or EFMLA.

7. Employees on EPSLA or EFMLA are entitled to continue group health coverage during the leave.

8. Employees may not use pre-existing paid time off (PTO) and EPSLA concurrently for the same hours, but an employee and employer may agree that they can supplement their EPSLA with accrued PTO.

9. Employers may require employees to use certain accrued paid leave concurrently with EFMLA. After the first two weeks of EFMLA, employees may elect — or employers may require — an employee to use accrued paid leave that would be available for the childcare-related reason under an employer's policy (but not sick leave) concurrently with EFMLA. Employers may not require employees to use existing paid leave concurrently with EPSLA.

10. Employers may pay employees more than they are entitled to for EPSLA or EFMLA but will not receive a tax credit for the excess.

11. For purposes of EPSLA and EFMLA, "employee" includes all U.S. full- and part-time employees and "joint employees" working on an employer's site temporarily and/or through a temporary agency. It does not include independent contractors.

12. For purposes of EPSLA and EFMLA, a "son or daughter" is the employee's biological, adopted, foster or stepchild; a legal ward; or a child for whom the employee is standing in *loco parentis*. It also includes an adult son or daughter (18 years of age or older) who is incapable of self-care because of a mental or physical disability.

13. Employees utilizing EPSLA and EFMLA are entitled to job restoration in the same manner as the Family and Medical Leave Act (FMLA), with an additional exception provided for employers with fewer than 25 employees, discussed here.

14. Employees eligible for both traditional FMLA and EFMLA are entitled to 12 weeks of leave total during the 12-month benefit period.

15. Other than for childcare-related reasons, employees may not use EPSLA and EFMLA together for any COVID-19-related reason. EFMLA may only be used for the childcare-related reason, while EPSLA may be used for this reason as well as the five others listed here.

16. For EPSLA, "full-time" employees are those working 40 or more hours per week, and "part-time" employees are those working fewer than 40 hours per week.

17. Employers of health care providers and/or emergency responders (as defined here) are not required to provide such employees EPSLA or EFMLA.

18. A small business (fewer than 50 employees) may claim exemption (discussed here and here) from the requirements of the EPSLA (for childcare-related leave only) and EFMLA when providing such leave will jeopardize the viability of the business as a going concern.

19. For purposes of EPSLA, "subject to a Quarantine or Isolation Order related to COVID-19" includes quarantine, isolation, containment, shelter-in-place or stay-at-home orders issued by any government authority that causes the employee to be unable to work although the employer has available work.

20. Employees are eligible for EFMLA if, at the time their leave is to commence they: 1) have been on the employer's payroll for at least the 30 calendar days prior or 2) they were separated March 1, 2020, or thereafter, and rehired on or before December 31, 2020, provided that they had been on the payroll for 30 or more of the 60 calendar days before layoff or termination.

21. For EFMLA, employees should provide notice as soon as possible. Thereafter, employees can be required to follow reasonable notice procedures (typically usual and customary reporting requirements). For EPSLA, employees can be required to follow reasonable notice procedures (typically usual and customary reporting requirements) after the first workday, or portion of the workday, on which they took leave.

22. An employee may use their two-week allotment of EPSLA once prior to December 31, 2020, whether used while employed by their current employer or in the employ of another employer.

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3 Takeaways About Leadership During Uncertain Times

When there is uncertainty, it's natural to seek certainty. As we navigate the challenges of COVID-19 together, it can be helpful to think about past leaders you admire who have navigated extraordinarily difficult times yet managed to leave a lasting positive impact on the world.

CHRISTINA FLOYD AND KAREN LEASTMAN

First American Legal Finance

> " As we communicate through the crisis, we should aim for clarity, professionalism and helpfulness. The simple act of sincerely listening to your colleagues is crucial. Seek to understand what they're experiencing, and particularly try to understand what is working well and where are they facing challenges. "

What was it in their approach that caused them to be so effective?

The answer can be distilled into three important traits: excellent communications, a human connection and striking the right tone. Weaving these three elements together helped them — and can help all of us — provide guidance and meaning through difficult times.

This pandemic is new, but crises have always existed. According to the U.S. Centers for Disease Control and Prevention, "Communicating in a crisis is different. In a serious crisis, all affected people take in information differently, process information differently, and act on information differently. As a leader, you need to know that the way you normally communicate with your community may not be effective during — and after — it suffers a crisis."

Whether you are a leader of people or simply a respected colleague, the "ability to find meaning in negative events and to learn from even the most trying circumstances" is one of the most reliable indicators and predictors of true leadership, according to new research from the *Harvard Business Review*.

So how do we proceed? Here is what our research found:

1. Communicate early and often. The COVID-19 pandemic is occurring in real time, and even as it develops around us, regular communications are key to sharing the information as it becomes available. Specifically: clarity, transparency and consistent communications are vital for us all.

"Thoughtful, frequent communication shows that leaders are following the situation and adjusting their responses as they learn more," reports McKinsey, the global management consultancy.

2. Get personal. Like all of us, your colleagues and clients are understandably experiencing stress and anxiety. During the times of social distancing, connection on a human-to-human level is more important than ever. Whether speaking one-on-one or addressing a large group, your eye contact, sincerity and facial expressions make a real difference. Now is a great time to get comfortable with a new technology so you can make a connection virtually.

"You are reaching out in a genuine and honest way to make human connections and help if you can," advises sales trainer Colleen Francis. "No matter the response you receive from your outreach, be serious and respectful and show empathy. Whether it's 'all systems go' or 'leave us alone' — work together to understand what your next steps are in helping their business and being a resource."

3. Set the tone, listen hard and talk straight. As we communicate through the crisis, we should aim for clarity, professionalism and helpfulness.

The simple act of sincerely listening to your colleagues is crucial. Seek to understand what they're experiencing, and particularly try to understand what is working well and where are they facing challenges.

After carefully listening, it is imperative to respond with both compassion and candor. If the pandemic is creating obstacles in certain areas of your business, be straightforward about the current reality and the path you expect to take to overcome the challenges.

We live in uncertain times, but the good news is that we are not without resources and options. We can take positive steps, use new technologies and control what can be controlled. These are all healthy ways to move forward. McKinsey calls this strategy "bounded optimism," or *confidence combined* with realism.

Business may be anything but usual, but we can all keep calm and carry on.

ABOUT THE AUTHOR

Christina Floyd is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully completed the Legal Management Finance Specialist Certificate Program through ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 200 firms.

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Anniversaries, Awards and Appointments

Members on the Move »»

Brian J. Bernhard, a member of the Mile High Chapter, is now Office Administrator at Dentons US LLP in Denver, Colorado.

Jennifer A. Denton, SHRM-CP, a member of the Houston Chapter, is now Office Administrator at Vorys Sater Seymour and Pease LLP in Houston, Texas.

Summer S. Jurrells, PHR, SHRM-CP, a member of the Austin Chapter, is now Office Administrator at Husch Blackwell LLP in Austin, Texas.
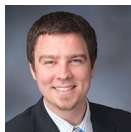
Matthew K. Masini, a member of the Oregon Chapter, is now Director of Finance at Dunn Carney, LLP, in Portland, Oregon.
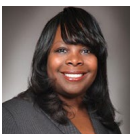
Deidre C. Moore, a member of the Capital Chapter, is now Director of Administration and Operations at Foley & Lardner LLP in Washington, D.C.

Noel Poole, a member of the Greater Los Angeles Chapter, is now Chief Operating Officer at Hooper Lundy & Bookman, Inc., in Los Angeles, California.
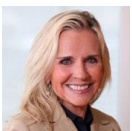
Wendy Rice-Isaacs, CLM, a member of the Orange County Chapter, is now Director of Administration – Orange County at Gibson Dunn & Crutcher, LLP, in Irvine, California.

Stacy A. Smith, a member of the Albany Chapter, is now Firm Administrator at Monaco Cooper Lamme & Carr PLLC in Albany, New York.

Kelli Taylor-Sanders, MSLA, a member of the Mile High and Cyber Chapters, is now Executive Director at Taylor & Anderson, LLP, in Denver, Colorado.

Angela Tyson, a member of the Capital Chapter, is now Office Administrator at Axinn Veltrop & Harkrider, LLP, in Washington, D.C.
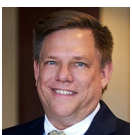
Stephen C. Wolf, CLM, CPA, a member of the New Orleans Chapter, is now Chief Operating Officer at Adams and Reese LLP in New Orleans, Louisiana.
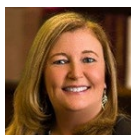
Laura L. York, a member of the Palm Beach County Chapter, is now Legal Administrator at Gladstone & Weissman, PA, in Boca Raton, Florida.

What's Happening at Headquarters

There's always a lot going on at ALA headquarters in Chicago. Here's a snapshot of what's in store for the coming weeks.

Watch the Virtual Annual Meeting

On May 6, ALA held its Annual Meeting online. Traditionally, this content — required by the bylaws — is held during the Association Luncheon at the Annual Conference & Expo. The coronavirus pandemic scrapped those plans, but we reconceptualized the event for the Zoom videoconferencing platform. The ALA Annual Meeting featured:

- State of the Association report with Immediate Past President James L. Cornell, III
- Passing of the gavel from Cornell to 2020–2021 ALA President Debra L. Elsbury, CLM, plus recognition of outgoing members of the Board of Directors
- Town Hall with Elsbury, Cornell, President-Elect Michael T. Bumgarner, CLM, CPA, CGMA, and Interim Executive Director April L. Campbell, JD

Visit *alanet.org/annual-meeitng-video* to watch a recording of the Annual Meeting.

Catch Up with ALA Roundtables and Hangouts

ALA introduced virtual Roundtables and Hangouts to provide an additional support system and discussion forum for our legal management professionals as they deal with the fallout from the pandemic. Visit the coronavirus response page to see upcoming dates for both types of Zoom-based meetings, as well as recordings of past sessions: *alanet.org/covid-19*.

The Roundtables, for example, have explored evolving best practices for employee wellness, financial strain and returning to the workplace.

New *Legal Management Talk* Episodes

Since we last mentioned ALA's *Legal Management Talk* podcast in the magazine, several new episodes have been added to the feed. Commit to about 20 minutes or less to learn something new from a subject matter expert!

- Three Types of Operational Excellence with Rob Mattern
- Wellness Strategies During the Pandemic with Lance Breger
- Cost Recovery for E-Discovery and Litigation with Rob Mattern and Nathan Curtis
- Coronavirus-Related IT and Remote Work Concerns with Michael Kemps

You can listen to the episodes on ALA's website or via BlogTalkRadio or Apple Podcasts. Subscribe so that you never miss a new episode in the future.