Greater Cincinnati Chapter

Association of Legal Administrators

2009 Gold Level Chapter

March 9, 2010 Meeting

By Peggy Gruenke

Microsoft Office 2010 in the Law Firm – What's New & What's Hype

Presenter – Peggy Friedhoff, BEC Legal

Where & When: Tuesday March 9th Noon – 1:20pm Netherland Hilton

The latest release of Microsoft Office is slated to be released June 2010. With this release, Microsoft promises several productivity and collaboration tools and features as well as some 'really cool' enhancements across each application.

Join us for a sneak peak of some of these tools and a discussion on how they may affect your law firm's productivity and overall staff experience and acceptance. Topics include:

1. Quick tour of Office 2010 environment
2. Brief overview of differences between 2007 and 2010
3. Top 5 new features you are going to want to have NOW
4. Top 5 new features that will bring a smile to you face, but not necessarily revenue to your firm
5. Top 5 things you should be doing RIGHT NOW to prepare an upgrade to Microsoft Office 2007 or 2010 (regardless of when your firm actually plans to make the move)

Our March 9, 2010 meeting will be at the Netherland Plaza in Salons BC at 12:00 p.m. Please RSVP to Lisa Kunz by **3/4/2010** at lkunz@bakerlaw.com with your choice of entree. The cost is $25.

Menu Selection

Salad
Roasted Tomato Soup with Cheddar Crouton

Entrée (Select One)
Asian Style Salmon with Sticky Rice and Vegetable Stir Fry

Roasted Chicken Breast with Whipped Potatoes, Garlic Spinach and Natural Jus

Chef's Choice Vegetarian Entrée

Dessert
Chocolate Raspberry Torte with Fresh Raspberries

Thank You to our March meeting sponsors!

Thank you to our February Roundtable Sponsors!!!!

January 12, 2010 Meeting Minutes

Minutes By: Tom Freeman

- The January meeting was held at Cincinnati Netherland Hilton.
- Kim Nickolas, Chapter President, welcomed everyone to the meeting and asked for a motion to approve the minutes from the October 13th. Motion was made, seconded and the minutes were approved.
- Peggy directed attendees to the information at each seat regarding Equitrac including the Equitrac Legal Solutions Suite handout and thanked Equitrac for being today's lunch sponsor.
- Peggy then introduced our vendor presenter, Peggy Friedhoff of BEC Solutions, who shared relevant insights on their product offerings to the legal community.
- Kim shared some additional business/administrative matters including:
    - Chapter Educational Seminar was a success. Thanks to Janet and Peggy for their leadership and the good attendance. The next Chapter Educational Seminar will be in two years; any ideas for topics can be shared with Kim.
    - The Chapter Holiday party was held last month at Havana Martini Club with 19 members attending. This event was well received.
    - The next social event is scheduled for July. Share any suggestions or ideas with Kim.
    - The Chapter Nominating Committee was formed and includes Janet as Past President, Kim & Jeff as board members and chapter volunteers Beverly Hutchinson and Andrea Griffith as members at large; submit your interest in running to any member of the nominating committee. The nominations include the following positions: Treasurer-Elect, Programs, Vendor Program, Membership, Newsletter, PR, Surveys, Website, and Community Challenge Weekend. The slate will be presented via email prior to the February Chapter meeting where voting will take place. The new board would take office in April, 2010 and include a transition meeting in March.
    - The next Breakfast Roundtable is scheduled for February 23rd 8:00 am at Keating Muething and Klekamp. Preliminary topics for discussion include the CLM certification and feedback/insights for the annual salary survey.
    - The Board approved maintaining the current local dues structure.
    - The next ALA National Educational Seminar is in Boston from May 3-6th. Kim encouraged everyone to attend as this event provides great content for adding additional value to our firms.
- Kim then introduced our featured speakers, Matt Champa and Leah Boggs of USI Midwest on the topic, "Creating and Implementing a Successful Wellness Program". Some insights shared included the value of a wellness program, getting buy-in from senior management prior to roll-out, create a brand you're your wellness campaign, constitute a wellness committee including a naysayer who many times will become a strong advocate, as well as making it fun. Leah noted that successful wellness programs do not have to be expensive.
- Significant discussion on the wellness topic occurred. Upon conclusion, Kim thanked both Leah and Matt for their thoughtful presentation.

Kim closed the meeting and noted the next chapter meeting is Tuesday, February 9th at our regular venue, The Cincinnati Netherland Hilton.

February 24, 2010 Meeting Minutes

Minutes By: Tom Freeman

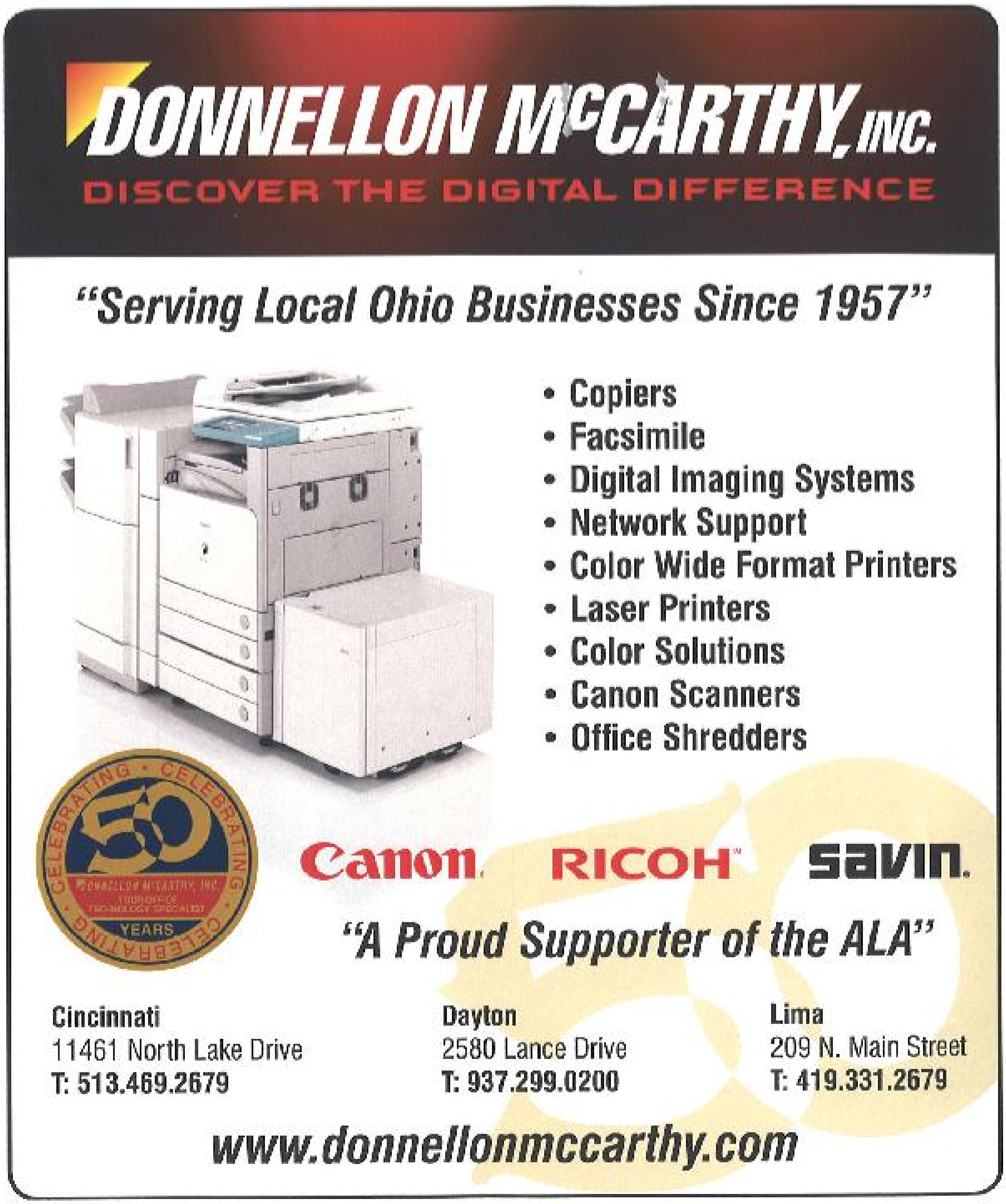
- The February 24th meeting was held at offices of Keating, Muething & Klekamp, PLL and commenced at approximately 8:00 am.
- Kim Nickolas, Chapter President, welcomed everyone to the meeting and asked for a motion to approve the minutes from the January 12, 2010 meeting. Motion was made, seconded and the minutes were approved.
- Lori introduced Tim Stone of Full Service Networking (FSN) who shared an overview of his company as well as opportunities for creating efficiencies by outsourcing certain technology functions. Each attendee was provided with handouts providing additional details.
- Lori thanked Tim for his insightful presentation.
- Kim presented the 2010 slate for the Greater Cincinnati Chapter of ALA committees for approval noting that our current officers will be in their second of a two year term that does not require voting. The following is the slate along with committee:
    - CCW: Andrea Griffith and Glenda Raley
    - Membership Lori Moser
    - Newsletter Roxanne Benjamin
    - Programs Bev Hutchinson and Erin Miller
    - Public Relations Mary Lynn Wagner
    - Survey Janet Sullivan
    - Vendors Peggy Gruenke
    - Website Judy Groene

  The slate, as presented by Kim, was seconded and unanimously approved.

  Note: the following Board Members will be in the second of a two year term and thus not voting applies:

  Succession:
    - Past President Janet Sullivan
    - President Kim Nickolas
    - President-Elect Jeff Middendorf
    - Secretary Tom Freeman

  Non-succession
    - Treasurer Julie Pile
- Lori introduced our featured presenter: Ms. Barbara Aras who is a principal of Aras Group LLC an executive coaching organization. Barbara engaged the attendees on the difficulties and opportunities for improved effectiveness by understanding different styles. Specifically, Barbara shared 12 Challenging Personalities and how to effectively engage with them. The presentation was well received and interactive. Lori thanked Barbara for the tangible takeaways shared.
- Lori concluded the meeting at approximately 9:15 am.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Transitioning Discussions to GCCALA LinkedIn Group
Julia D. Pile, CPA, MBA
Operations Manager – The Drew Law Firm Co., LPA

The Greater Cincinnati Chapter of the Association of Legal Administrators has formed a group on LinkedIn for members to hold discussions, post interesting news articles, distribute event information and post job openings. The premise of forming this group is that it would replace the number of e-mails in our member's inboxes and allow for the following of threads of discussions. This group is closed to only members of our local chapter and discussions cannot be viewed by those outside of our group.

To join our group on LinkedIn, you must first join this on-line professional community. Go to the internet and go to the site www.linkedin.com. If you do not see Join LinkedIn Today box on the right hand side of your screen, click on Join Today at the top. All you need to get started is your first name, last name, e-mail and a password. You DO NOT need to fully complete the profile to join our LinkedIn group, but I will explain why at our May monthly lunch meeting why and how you would do so.

There are two ways you can become of a member of the Group.

1. Search for me, Julia D. Pile and ask to add me to your network. When prompted for how you know me, click on Other and enter my e-mail address of jpile@drewlaw.com Once we have connected, I will then send you a group invitation.

2. You may also search for the group by using the search box in the upper right hand corner of the screen. The search box defaults to a People search. Click on the down arrow and change this to Group. Enter: Cincinnati and Legal and press enter. Three groups should appear, one of which being ours. Click on the group link. Click on the Join Group box. A notification will then be sent to the managers of the group and we will accept your request to join.

There will be default settings saved for this (and most any) group, but you can change these at anytime by going to the group, clicking on More and My Settings. The two important settings are the display of our group logo on your profile and the frequency which you receive the group digests. Group digests are a listing of the activities in our group with hyperlinks to the conversations. These digests can either be received daily or weekly.

The discussion area of the group is where most of our activity will take place. Rather than someone sending an e-mail message to our group and everyone sending responses, a person can start or post to a discussion on LinkedIn. Other members can then reply to the posting. By using this technology, we can cut down on the number of e-mail messages we receive and have an organized storage area for our questions and responses. We will also be posting meeting announcements in the Discussion area.

If you have trouble getting started on LinkedIn or would like me to walk through getting you set-up over the phone, please feel free to contact me at 513-619-1637 or jpile@drewlaw.com
Now let's all get Linked!

Haiti Earthquake Relief Effort Update

Due to the generosity of various ALA Chapters, including ours, more than $25,000 was raised to provide relief to those people in Haiti who endured the devastation that was left by the January 12th earthquake. Please continue to keep these people in your thoughts and prayers as they try to rebuild their lives.

ALA Association of Legal Administrators | Greater Cincinnati Chapter

Association of Legal Administrators
Greater Cincinnati Chapter
2010-2011 Board of Directors and Committee Chairs

Past President	Janet Sullivan	Statman, Harris & Eyrich	513-621-2666	jsullivan@statmanharris.com
President	Kim Nickolas	Baker & Hostetler	513-929-3480	knickolas@bakerlaw.com
President Elect	Jeff Middendorf	Katz, Teller, Brandt & Hild	513-721-4532	jmiddendorf@katzteller.com
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Treasurer	Julie Pile	The Drew Law Firm	513-619-1637	jpile@drewlaw.com
Membership	Lori Moser	Keating, Muething & Klekamp	513-579-6556	lmoser@kmklaw.com
Programs	Beverly Hutchinson Erin Miller	Denlinger, Rosenthal & Greenberg Katz, Teller, Brandt & Hild	513-621-3440 513-721-4532	beverly@drgfirm.com emiller@katzteller.com
Vendors	Peggy Gruenke	Finney, Stagnaro, Saba & Patterson	513-533-2732	pgruenke@fssp-law.com
Newsletter	Roxanne Benjamin	Wood & Lamping	513-852-6038	rmbenjamin@woodlamping.com
Public Relations	Mary Lynn Wagner	Keating, Muething & Klekamp	513-579-6902	mwagner@kmklaw.com
Surveys	Janet Sullivan	Statman, Harris & Eyrich	513-621-2666	jsullivan@statmanharris.com
Website	Judy Groene	Katz, Teller, Brandt & Hild	513-721-4532	jgroene@katzteller.com
CWW	Andrea Griffith Glenda Raley	Wood & Lamping Ulmer & Berne	513-852-6006 513-698-5040	amgriffith@woodlamping.com graley@ulmer.com

Association of Legal Administrators
Master Calendar

MARCH 2010

March 3 –March 5 Thomson Reuters Law Firm Leaders Forum, Ritz-Carlton Hotel, San Francisco, CA. ALA will be exhibiting.

March 10 – March 12 Legal Marketing Association Annual Conference, Hyatt Regency Hotel, Denver, CO. ALA will be exhibiting.

March 17 * ALA Webinar – Law Firm Innovation: Will You Lead or Follow?

March 25 – March 27 ABA TechShow, Hilton Chicago, Chicago, IL. ALA will be exhibiting.

APRIL 2010

April 21 * ALA Webinar – Administrator's Role as Coach in a Multi-Generational Workplace

MAY 2010

May 2 ALA– Certified Legal Manager (CLM) Exam, Boston, MA (in conjunction with ALA's Annual Conference)

May 3 – May 6 ALA– Annual Conference and Exposition, The John B. Hynes Veterans Memorial Convention Center, Boston, MA

May 19 * ALA Webinar – The Social Networking Revolution May 31 Memorial Day, ALA Headquarters Closed

JUNE 2010

June 16 * ALA Webinar – The Keys to Develop and Implement the Firm's Dreaded Strategic Plan

June 14 – June 16 ALA– Essential Competencies for Legal Administrators, Grand Hyatt, Denver, CO

June 25 – June 27 ALA– Chapter Leadership Institute, Caesars Palace, Las Vegas, NV

JULY 2010

July 5 Independence Day, ALA Headquarters Closed

July 10 – July 13 American Association of Law Libraries Annual Conference, Colorado Convention Center, Denver, CO. ALA will be exhibiting.

July 21 * ALA Webinar – Legal Risks to Assessing Candidates by Social Networking Sites

July 22 National Association for Court Management Annual Conference, Sheraton Hotel, New Orleans, LA. ALA will be exhibiting.

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Leadership in Law Firms

Wendy L. Werner

Despite the fact that there are entire sections of bookstores with leadership as the topic, seminars, programs and workshops – leadership as a defined construct has always seemed elusive to me. What makes a leader? What makes a great leader? And the question that is always debated – are leaders born or made?

While business people are often groomed over of a period of years and positions for a leadership role, this idea is fairly new to the legal profession. Historically, firms were run by managing partners, practice group leaders, by committee or by the partnership as a whole. Behind the scenes, professional law firm managers have always worked very hard to influence the designated attorney leaders by providing good financial data, and often by trying to use their more formal business backgrounds to influence the ways that the formal leaders ran the practice. Times have changed, and while those business managers have continued to serve as an influence, law firms may now understand the importance of developing real leadership skills among their own ranks.

Law firm administrators working with lawyers face two particular challenges that come from the basis of their profession. The first is that law is based upon precedent. From the moment they began the study of case law in law school, attorneys learn to look backward first. While this is critical to their work, organizations must look not just to the past, but also to the future. The second challenge is that lawyers must, in their work, be risk avoidant. And while lawyers help their clients avoid undue risk, and will do the same in the role as a leader in a firm, there are some risks that are necessary to move an organization forward and to be on the cutting edge of change. If you are working in a leadership capacity with lawyers, you are wise to understand this deep-seated background.

While in no way comprehensive, here are a few recommended attributes for law firm leaders.

Ego strength without egotism. Serving in a leadership role in a law firm requires the individual to have a strong sense of security in their own capabilities. Leaders have to make difficult decisions that rarely receive universal acceptance. When you are a first among equals this can be even more difficult. But the ability to manage your own ego in such a way that it does not get in the way of decision making or change is also essential. While a leadership position may be the basis for a heady experience, it shouldn’t go to your head.

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A willingness to deal with unpleasant truths. In these tough economic times law firms have had to make a number of difficult decisions, many of them having to do with personnel. Good leaders tell the truth about what is going on and do so in a timely way. Any reasons for decisions that are something other than the truth will ultimately come back to haunt the leader and the firm. So if you have to lay off attorneys or cut staff, do so in a professional way, discuss the economic realities and move on.

Know what you know and what you don't know. Just because you are in charge doesn't mean that you know everything. The wise leader surrounds him or herself with others who have expertise in areas that are critical to the firm that the formal leader may not possess. And when knowledge or skills that the firm needs aren't found inside, the leader is willing to look outside for expertise the firm can use to its benefit.

Ongoing and open engagement. The ability to engage others in dialog with the idea that an open discussion that may actually change your opinion of an issue is a great way to keep others in the firm invested in the firm's success. This is something that should be fostered at all levels of the organization, not just with senior members of the firm. Senior leaders may need formal structures and reporting mechanisms, but they also need to talk with people at all levels of the firm. If you want buy-in on decisions it is essential to have relationships throughout the organization.

Praise in public, criticize in private. This adage applies no matter the level of your position in your firm. However, when you are in a leadership role your words carry a depth and heft elevated in part due to your position. Letting people know they have done well should be broadcast generally, while an employee's errors should be addressed in private, corrected and not dwelled upon.

Develop leaders at all levels of the organization. Not all leaders are at the top of the organization. Leaders reside at a variety of levels and locations in any law firm. Leadership functions in a variety of ways, both formal and informal. These informal leaders should be recognized for their contributions and encouraged to continue their involvement. In addition, if you aren't grooming people at junior levels of the organization, who will be your future leaders? Everyone knows an organizational leader who has no title or defined responsibility, but somehow always manages to make a contribution.

Invest in your own development. For information and training in leadership, don't hesitate to look outside the law. If you are thrust into a leadership role, or know someone who has been, don't hesitate to look far and wide for literature that will help you in your new role. And while you want to maintain confidentiality about all client matters, it doesn't hurt to engage your peers in other firms to talk about issues that face all organizations of your kind.

Commitments beyond the office. Your life outside of work must have meaning for you to be a balanced leader who will understand that others will have motivations other than their work. You lead by example in all aspects of your life, whether it is work, family, avocation or community involvement. It rings inauthentic to talk about getting your lawyers involved in things outside of the office if you aren't doing it yourself.

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Know when to step aside. A good leader knows when he or she needs to move out of a leadership role and prepares the organization and the successor for the new position. Ideally there should be more than a year between the announcement of a leadership change and succession. This will allow the departing leader to finish projects and to allow the new leader to participate in the calendar life cycle of the organization in the on deck position. A good leader retires from their role leaving that position and the firm in a better place than when they started.

Wendy L. Werner is the owner and principal of *Werner Associates, LLC*,
a career coaching and law practice management consulting firm.
She is also the editor of the ABA's Law Practice Management webzine,
Law Practice Today http://www.abanet.org/lpm/lpt/home.shtml
She can be reached at www.wendywerner.com/associates

Chapter Event Dates

Meetings are normally held on the 2nd Tuesday of each month

Tuesday, April 13, 2010 @ 12:00 noon – to be announced
Luncheon – Netherland Plaza Hotel

Tuesday, May 11, 2010 @ 12:00 noon – to be announced
Luncheon – Netherland Plaza Hotel

Tuesday, June 8, 2010 @ 12:00 noon – to be announced
Luncheon – Netherland Plaza Hotel

ALA Association of Legal Administrators

Webinars

03/17/2010
Law Firm Innovation: Will You Lead or Follow?

04/21/2010
Administrator's Role as Coach in a Multi-Generational Workplace

05/19/2010
The Social Networking Revolution

06/16/2010
The Keys to Develop and Implement the Firm's Dreaded Strategic Plan

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