



FROM THE PRESIDENT

The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low and achieving our mark.

- Michelangelo



In this edition of *The SCALA Scoop* you will find an article by Nancy L. Probst, CLM and ALA/SCALA member, in which she describes her personal journey on the road to becoming a Certified Legal Manager through the Association of Legal Administrators. I commend this article to us all for inspiration and challenge.

As ALA/SCALA members we are indeed fortunate to have ALA as a resource for professional learning and growth. The following are commended for your review at www.alanet.org:


1. **Certified Legal Manager Certification** providing numerous individual benefits as well as employer benefits, such as increased knowledge of all legal administration areas, respect and recognition in the legal industry, professional credibility, and increased value to the organization and employer.
2. **ALA Management Solutions** providing a reference desk of research studies that include surveys, samples, statistics, books and articles, and policies.
3. **Retreat Planning PLUS** providing help in tailoring a retreat model based on your firm's objectives and designed specifically for your unique needs, and in finding new ways to motivate attorneys and staff.
4. **Legal Management Resource Center** providing information that directs you to valuable resources.
5. **ALA Webinars** offering the following in the near future: 11/16 – *Safe Stress!*; 1/18 – *Selling Blue Elephants: Client Marketing, Retention and Loyalty*; 2/22 – *Employee Handbooks for Law Firms – Careful, Careful!*; and 3/21 – *The Art of Active Listening*.


6. **ALA Management Encyclopedia** providing answers to questions on financial management, human resources, and strategic planning, for example.
7. **Two Educational Conferences** offering specialized education: Law Firm Management Conference and Essential Competencies for Legal Administrators.

And while you're there at www.alanet.org, please check out **Legal Marketplace**, which provides online connection with Business Partners.


I encourage us all to set high goals and stretch our minds! One of my favorite authors, Anonymous, has said, "A mind once stretched by a new idea never regains its original dimensions."

Clara Godshall
President, 2011 - 2012





Ignite Your Future ... Renew Your Spirit!



So, you missed the Super Early Bird conference discount. Drats! There is still time left to capitalize on the Early Bird registration fee for the [2012 ALA Annual Conference & Exposition](#), April 22-26 in Honolulu. Don't miss out on this prime opportunity to save **\$200** off the regular Conference registration fee!

[now](#) and take advantage of this incredible offer.

Looking for help justifying your attendance in 2012? Be sure to review the [Justification Tool Kit](#), including a budget spreadsheet, useful tips and a cost comparison of ALA Annual Conferences from 2007 to 2012.

The Annual Conference Committee is hard at work confirming session topics -- the same level of [quality and relevant education](#) that you've experienced in the past. As soon as the educational program is finalized we will be contacting you with the full details.

In addition to cost savings you'll receive with the Super Early Bird discount, ALA has negotiated a special room rate of **\$199 per night** at the Hilton Hawaiian Village. [Make your reservations](#)

Join us in Honolulu and "Ignite Your Future ... Renew Your Spirit."

2012 ALA Annual Conference Video



**Early Bird
Conference
Discount
Ends
February 6,
2012!**

SC Chapter News

Effective Marketing Strategies for Law Firms

On Tuesday, November 8, 2011, the South Carolina Bar-CLE Division (co-sponsored by SCALA) will present: **Effective Marketing Strategies for Law Firms** featuring Practice Advisor David Phelps of Atticus.

Registration begins at 11:30 at the Bar Conference Center located at 1501 Park Street in Columbia. For more information and to register, please visit SCALAnet.org.

ABOUT THE SEMINAR

The seminar will focus on a referral-based marketing methodology and will provide attendees a foundation for attracting higher value clients on a predictable basis. Speaker David Phelps will focus on "new media strategies" for law firm marketing, including the use of Facebook,



Twitter, blogs, search engine optimization, etc. This seminar qualifies for 2.0 MCLE credit hours.

ABOUT THE SPEAKER

David Phelps possesses years of experience working with law firms of all sizes, he brings a diverse skill set of legal technology expertise, practice management and considerable skill and knowledge of law firm marketing. He is a regular speaker on topics such as effective legal marketing strategies, time management for attorneys,

legal technology and financial management. David has a business degree from the University of Florida in Gainesville and a degree in Legal Studies from the University of Central Florida in Orlando.

REGION 2 CONFERENCE & EXPO



Connect at the Region 2 Conference & Expo!

Gain the knowledge, resources and networking vital to face any challenge at your law firm at the Region 2 Conference & Expo, November 3-5, 2011, at the Charlotte Westin in Charlotte, NC.

Don't miss this cost-effective, two-day conference close to your home with professional legal industry speakers and more than 20 educational sessions — it's the best investment you'll make this year!

Banking on Your Future

Register before
October 6 for early bird
savings!

Learn more at
www.alanet.org/region2



Your connection
to knowledge, resources and networking



Becoming a Certified Legal Manager

By Nancy L. Probst, CLM



Shortly after joining SCALA several years ago, I began reading about [ALA's Certified Legal Manager \(CLM\)SM program](#) in the ALA

magazine and on ALA's website. The more I learned about the program, its requirements and rewards, the more determined I became to achieve the CLM designation.

Why

My journey as an accountant has taken me into many lines of business. I "grew up" in the construction and steel industries, working for a home builder, a land and property developer, a wood preserving company, a long-haul trucking enterprise, and a steel fabrication and construction company. Cost accounting was my love and I gained valuable experience at each of these enterprises. I took a job as controller at a law firm soon after moving to South Carolina, almost 20 years ago, to be close to my twin sister. I was concerned about such a different type of business, but billable hours and client advanced expenses were just another form of cost accounting. What was completely different was the dynamic of management. All the other companies I had worked for had a single owner (or two), with clearly defined lines of authority. The law firm environment is another world with many

owners, and blurred and often changing lines of authority. I really enjoyed this new adventure and began learning all I could about how law firms operate. This learning process has never ended and is what led me to pursue the CLM designation.

How

Once I decided to actually get my CLM, I requested the CLM package from ALA and began the process of completing the educational requirements needed to sit for the exam. Since I had recently taken the job as firm administrator at Robinson McFadden, and my title at my previous law firm had been controller, I had to fulfill the additional requirements of a functional specialist. That meant even more educational requirements in each of the four other management categories. In the 24 months prior to applying for the exam, I had to complete 25 hours of course work and only four of those hours could be from on-line study. It was a challenge to get all of that completed, but I was able to complete the educational requirements with the help of all the courses at the ALA Annual Conference. The whole educational process truly was a journey. I learned new things, honed skills, and gained additional insight into the legal industry.



Becoming a Certified Legal Manager

(Continued...)

Once the educational requirements were complete and my application was accepted, I was ready for the exam! Yikes! It had been a while since I sat for anything like that and I was nervous and excited at the same time. I purchased the study guide and flash cards from the ALA website and began studying while I waited for the closest exam date. Finally, I flew to Baltimore and took the test. There were about a dozen other CLM hopefuls in the room. We had four hours to complete the multiple-choice test and could leave when we were done. I began



to regret telling anyone that I was sitting for the exam in case I failed, but then my determination to succeed kicked in and I finished the exam in less than two hours. As I got up to leave, I noticed I was the first one done. I got worried that I missed something, so I took a quick look over my test again, and feeling good, turned it in and walked down to the Baltimore Inner Harbor to relax. There was about a six-week waiting period before I found out that I actually passed the exam and during that time I was sure I had done well, then I was worried again. When I finally got the letter that told me I'd passed, I

was relieved, excited, and very proud that I had accomplished my goal.

Benefits

In my role as Firm Administrator at Robinson McFadden I truly enjoy the challenge of managing finance, HR, marketing, operations, and IT and the CLM process helped me to be more confident in each of these areas. It really has made me a well-rounded administrator.

Shortly after I received notification that I had earned my CLM designation, ALA sent a letter to each member of my management committee telling them of my achievement. In the letter they told of the experience and educational requirements, and the testing process. Additionally, the letter noted that I had the honor of being the first in South Carolina to achieve the designation. One of the management committee members sent the letter by e-mail to our entire firm, congratulating me on my accomplishment. I received congratulations for quite a while afterward.

Conclusion

This journey of CLM certification has been very rewarding. I am one that needs to learn new things and stretch myself to find out more about our fascinating world of legal management. The re-certification program will keep me learning and growing into the future and keep me from getting stale.

A good leader is not someone that knows everything, but one that wants to know everything.

Strategic Planning: Survival of the Fittest

Drawing Up Solid Plans for the Future Is Essential

By Richard Puzo, CPA, and Eric Weiss, CPA, J.H. Cohn LLP

As many law firms expand their traditional areas of expertise and geographic reach, the legal marketplace has become increasingly competitive. Strategic approaches that have been successful in the past may need to be re-examined. To meet the conditions of today's intense business environment and prepare for the future, a strategic plan is especially critical to a firm's future performance and success.

The objective of strategic planning is to properly position the firm for the long term by evaluating both tangible and non-tangible factors, including the culture of the firm, the wants and needs of the partners, the economy, the industry, and developments in areas that impact law and business. Doing so can be a motivating experience for both partners and associates, who will have the opportunity to reflect upon the firm's philosophy and their individual roles and responsibilities to the firm's success.



Planning committees are essential to help crystallize this initiative; when properly executed, they can effectively serve as a central repository for gathering firm financial and statistical information, brainstorming operational issues, goal setting, facilitating buy-in among partners and others, and ensuring that the resulting plan is implemented. To make this happen, this central committee should bring together key decision makers and include not only the managing partners, but the CFO, controller, firm administrator, key partners and department heads of major practice areas. Committee members and other important people within the firm must understand how vital proper planning is to the firm's future performance, recognizing it as an important investment in the firm's future marketability, profitability and viability.

Committee members should be charged with con-

sidering and subsequently answering such questions as:

- What profit does the firm expect to achieve in the coming year?
- Do the capabilities of the firm match current market demand?
- What are the firm's specialties, and how can they be more effectively marketed?
- How is the firm perceived externally, and for what specialties does it want to be known?
- Objectively speaking, how does the firm stack up against the competition?
- Do the firm's clients fit a certain profile?
- What do the firm's rainmakers and others, both on and off the committee, think the firm should concentrate on going forward?
- Which practices and offices should be enhanced or de-emphasized? Which new markets or services should be tapped?

When creating a strategic plan, firms should also consider goals for technology, advertising and marketing and, as appropriate, incorporate plans for opening additional offices or hiring new staff.

Gathering input from a variety of internal resources is likely to yield surprising, insightful responses; but, it's critical that clients be solicited for their insight as well. Though sometimes overlooked, the information that can be obtained from clients, through both client surveys and casual conversation, is essential to the strategic planning process. What do they think of your work? What do they consider to be your strongest and weakest points? What clients (and prospects) want and how the firm can meet and exceed their expectations should be a key component of the entire plan. For example, your clients may flag a service delivery problem, or your survey may reveal that a service offering which requires a significant amount of time and resources is not resonating with clients. Factor this valuable information into the planning process to render your services in the near future as efficiently and cost-effectively as possible.

The completed plan should clearly identify what is considered success, and who at the firm is going to reach the goals and when those goals should be attained. The created plan cannot be viewed as a static document; once agreed upon by committee members and, as appropriate, voted upon and approved by the firm, it must be continually evaluated

Strategic Planning: Survival of the Fittest

(Continued...)

and adjusted as necessary to meet shifting market conditions to help ensure that it remains relevant and effective.

Review and communicate progress at regular intervals throughout the year. Stay in close communication with the entire staff and be sure to trumpet quick hits — those “low-hanging fruit” successes — on a periodic basis.

Your accounting firm can offer valuable insight into the strategic planning process by analyzing prior financial data as well as assisting in establishing a budget. In addition, it can analyze the financial implications of various scenarios the law firm may be contemplating, including hiring new staff or acquiring another firm.

Benchmarking studies, which compare a firm’s own costs to its most relevant competitors’ costs, have the potential to improve profits without a corresponding sacrifice in other areas of a firm, and should be made a critical part of the strategic planning process. We know of one

firm, for example, that underwent an analysis of its current profitability by utilizing benchmarking data. As a result, it made changes to billing rates and billable hours, and adjusted how staff’s time was leveraged. By streamlining and making the most of existing timekeepers, the firm realized improved profitability of \$750,000.

MEASURING PERFORMANCE

Strategic planning is a process and budgeting is a tool. One without the other is not going to help your firm achieve its objectives. As the strategic plan begins to crystallize, a realistic budget will lend credibility by enabling management and others to put a dollar value on certain action steps and their impact. A sophisticated budget — complete with proper tracking mechanisms — will allow managing partners and practice leaders to compare certain results year-to-year or month-to-month, and will provide an opportunity to benchmark firm performance against the competition. Successfully planned budgets take multiple factors into account, including fee projections, personnel cost estimates and estimated operating expenses. As part of the budgeting process, law firms should also develop a capital financing plan, which involves how the firm’s operations will be financed (debt vs. equity) and the timing of distributions to the

Strategic planning, when carefully crafted and worked on as a team with your accounting firm, is more important than ever considering today’s challenging market circumstances. A strong plan can help position your firm strategically — as a leader — and increase its profitability in the years to come.

Richard Puzo, CPA, is a J.H. Cohn LLP partner and the director of the Firm’s Law Firm Industry Practice. He can be reached at rpuzo@jhcohn.com or 877-704-3500.

Eric Weiss, CPA, is also a J.H. Cohn LLP partner and a member of the Firm’s Law Firm Industry Practice. He can be reached at eweiss@jhcohn.com or 877-704-3500.

Reprinted with permission from the “Jer-Z-Journal,” the newsletter published by the New Jersey Chapter of the Association of Legal Administrators, Fall / Winter 2010

The SCALA Scoop

The “SCALA Scoop” is the newsletter of the Association of Legal Administrators, South Carolina Chapter. The Scoop is published 4-6 times per year and distributed to over 50 legal administrators, business partners and other legal professionals throughout South Carolina.

Direct questions or submissions to:
Rob Cluxton, 843-554-3100
rcluxton@joyelawfirm.com

Shawn Payment, 843-534-4251
shawn.payment@nelsonmullins.com

Advertising Opportunities

Advertising space is limited and advertisers are urged to submit ads as early as possible.

Advertising Rates: (Per issue)

Quarter Page: \$200

1/8 Page (Business Card Size): \$100

Checks should be made payable to: “SCALA”. Payment must accompany ad copy.

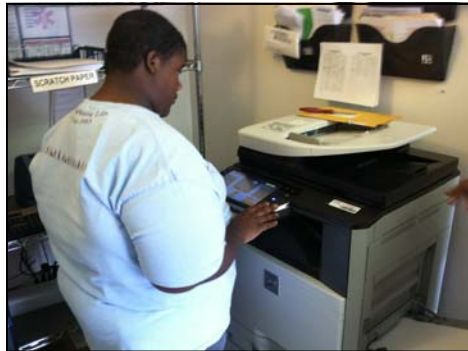
Business Partner Spotlight

SHARP

SHARP BUSINESS SYSTEMS

Giggie's Bonding is a 75-year old family owned bail bonds service company in Greenville, SC. Ron Chitty (SBS-SC) worked with Sharon Butler (owner), who recently upgraded a Sharp 2300 to a new Aries MX-3110 full system. As part of our "Continual Improvement" process, SBS Trainer Kristin Schwalbe conducted follow-up training and discovered another way we could improve our customer's experience: Braille Overlay Labels.

Chris Baker, an employee at Giggie's, is blind. Some of his duties include making copies, sending



faxes, and delivering prints throughout the building. Being blind, Chris often relies on technology to improve his productivity at work. During the training, Kristin questioned about Chris's challenges, and remembered some mention of Sharp's work with Braille overlay labels.

Eventually, Kristin was put into contact with Raymond Miney, Assoc. Product Manager for Entry Workgroup MFPs. During the conversation, Mr. Miney told Kristin that they were presently testing the overlay labels on a unit at corporate, but they were also looking for a field test with actual customers.

Raymond scheduled a meeting with the customer where he installed the Braille overlay labels, and Kristin and Raymond spent a part of the afternoon with Chris, teaching him how to use the overlays, while getting his feedback.

Kristin did weekly updates with Chris to see how the overlays were working for him and if the overlays negatively impacted any of the other users. All reports from Chris were positive and the other users were not affected by the overlays being used. After installing the overlays, Chris was able to fully operate the unit, operate the fax function (which was totally new for him on the Aries unit) and he said that he was, "happy to be able to use

it." Chris also finds Sharp responsive to his special needs and appreciates a vendor like Sharp that consider "out of the box" thinking.

The overlays were produced on a Braille writer by Crystal Roy of the North Dakota Vision Services/School for the Blind, and were the brain child of Raymond Miney. According to Miney, "the idea behind the Braille Overlay Labels was to make this next generation of Sharp MFPs a showcase of simplicity for our visually impaired users. With so many devices, appliances and machines today beginning to incorporate touch-screens into basic functionality, those who require tactile touch in order to operate a device may no longer feel properly represented. We needed to have these overlays focus on easy access and usability by both the visually-impaired and sighted user. We wanted to make these overlays as thin and as transparent as possible, but without blurring the screen or sacrificing the efficacy and on-screen editing capability of the MX-2610N/3110N/3610N and MX-4110N/4111N/5110N/5111N. With Ms. Roy's expertise, we think we were able to accomplish that."

Big kudos goes out to field trainer Kristin Schwalbe. Kristin said, "At SBS-SC customer satisfaction is our main goal. We strive to always have 'Raving Fans.' With the recent advances made in technology, we now have an opportunity to do just that, more than we've ever have before. The Braille Overlay Kit is one of the best advances I've seen yet! To think that this opportunity to help Chris perform his job more efficiently will open thousands of doors for others that are visually impaired, I realize now that the sky is the limit! I am so honored to be a part of this adventure!"



SCALA 2010 - 2011 OFFICERS

Clara D. Godshall, President
Parker Poe Adams & Bernstein, LLP
200 Meeting Street, Suite 301
Charleston, SC 29401
(843) 727-2690
claragodshall@parkerpoe.com

Margaret Glassman, President-Elect
Ellis Lawhorne & Sims, P.A.
1501 Main St, 5th flr
Columbia, SC 29201
(803) 212-4976
mglassman@ellislawhorne.com

Heather Niemi, Treasurer
Parker Poe Adams & Bernstein, LLP
P.O. Box 1509
Columbia, SC 29202
(803) 253-8920
heatherniemi@parkerpoe.com

Mimi Love, Secretary
Turner Padget Graham and Laney P.A.
1901 Main Street, 17th Floor
Columbia, SC 29201
(803) 227-4211
mlove@turnerpadget.com

Jane Todd, Immediate Past-President
Nelson Mullins Riley & Scarborough, LLP
Meridian, 17th Floor, 1320 Main Street
Columbia, SC 29201
(803) 255-9348
jane.todd@nelsonmullins.com

Sincere Thanks to our 2011 Business Partners!

Gold

Connecting Elements
Document Technologies, Inc.
Huseby, Inc.
Sharp Business Systems
of South Carolina
Thaxton Barclay Group, Inc

Silver

F3 Concepts, LLC
Ikon Office Solutions, Inc.
Royal Cup Coffee
South Carolina Bar - CLE Division

Silver (Cont.)

Square Boxx
William Ives Consulting

Bronze

ALPS-Attorneys Liability Protection Society
Blumberg Excelsior, Inc.
Carolina Records & Information Management
Cash Management Solutions
Client Profiles
Equitrac
Lorick Office Products, Inc.
Total Records & Information Management
UPS - United Parcel Service