

Sept/Oct 2015

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Palm Beach County
Chapter



The Palm Beacher

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President's Message



Susan Goldstein
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By the time you get this newsletter Thanksgiving will be fast approaching. It is with much pride that I focus on the many ways in which the PBCALA will benefit the community in the coming months.

Our Chapter has always been involved in the local community. This year, the Board and Community Connection Committee have decided to spread our support among several worthy community organizations. November will bring thanks from many local families due to the hard work and dedication of PBCALA members. If you have not already done so, it is not too late to join in the Habitat for Humanity event on Saturday, November 7th. Also, we are collecting non-perishable food items and/or Publix gift cards for the Palm Beach County Food Bank. Please bring your items to the lunch meeting on Tuesday, November 10, 2015. If you would like to participate, but are unable to attend the meeting, Laura Shaw will arrange to pick up your donation.

Our final event to benefit the local community this holiday season will be an Angel Giving Tree to benefit the families and

children assisted by Families First of Palm Beach County. The event will be organized by Mary Aguiar. Please contact Mary to advise how many "Angels" you would like to sponsor this year. If possible, we ask that you open this giving opportunity to friends and co-workers who may want to help fulfill holiday wishes for children in our area.

Don't forget to save the date for the PBCALA Annual Holiday Party on Tuesday, December 8, 2015 at the Palm Beach Zoo. This should prove to be a fun event in an unusual setting. I hope to see many of you there.

Also, save the date for another Community Connection event, a run/walk on February 27, 2016.

We are still looking for a few volunteers to donate a small bit of time to the Chapter. If anyone is interested, kindly contact Laura Shaw. Laura will let you know what committees need assistance.

Take care to all. Have a safe and enjoyable holiday season!



September/October Member Meetings



Our speaker at the annual Attorney Appreciation luncheon was Dr. Dale Henry. Dr. Henry's many experiences in the field of business and education make him a natural when it comes to lively and humorous presentations. Although Dr. Henry believes in the importance of laughter, his presentations always deliver a strong message packed with useful tools.

A native of East Tennessee and the foothills of the Smoky Mountains, he draws heavily on his storytelling background to hold the audience in the palm of his hand.

On October 13, 2015, we had an AMAZING speaker! Our one and only fellow member, Ed Ratka! If you missed this meeting, you missed a lot. Ed spoke on "Law Firm Budgeting"! Our firm doesn't do "formal" budgeting for various reasons.....that said, I can tell you that I picked up a thing or two from Ed's presentation!

One would think—budgeting—zzzzzz! I can promise you that Ed's presentation was anything but boring! He even tried a little incentive to have us turn in our evaluation forms! I hope we can persuade Ed to speak again. If you missed it this time, you won't want to miss it in the future!

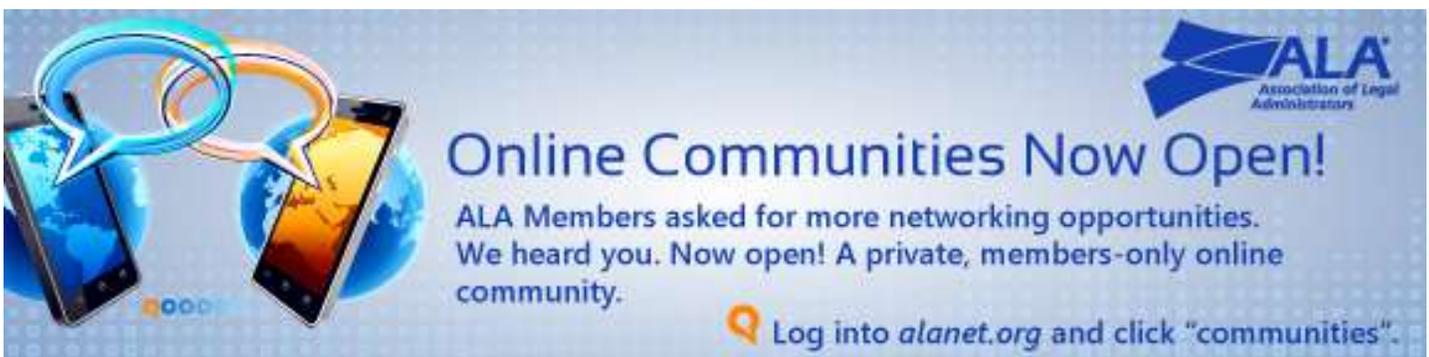
New Member Spotlight!



Peggy A. Jimenez is an administrator with 30 years experience, who has been Richman Greer's administrator for the past year-and-a-half. Peggy has an AS in Secretarial Science, obtained her Certification in Law Office Administration from Florida International University and is currently studying for the CLM exam.

Peggy established the PinoStrong Foundation to raise awareness for organ donations in honor of her son, who was tragically hit by a car in 2014. Please follow PinoStrong Foundation on Facebook. As Peggy says, "Life is short, we don't know the day we will be called, keep perspective on the true important things in life, we tend to lose sight of them. Count your blessings and hug your family and friends as often as you can."

As with all administrators, Peggy is a multi-tasker, but she also has patience and is learning to live one day at a time. Peggy loves going to her place in the Keys and enjoys recreational boating.



ALA
Association of Legal Administrators

Online Communities Now Open!

ALA Members asked for more networking opportunities. We heard you. Now open! A private, members-only online community.

Log into alanet.org and click "communities".



Business of Law Conferences

By: Gloria E. Hernandez, CLM
Burlington & Rockenbach, P.A.

I was fortunate this year to have attended two Business of Law Conferences—New Orleans and Las Vegas—as a representative of Region 2. It was *awesome!* Not only for the quality of the sessions provided, but for the networking opportunities.

I interacted with more ALA members at these events than I ever could during the annual conference. Although these conferences are more laid back, they are very spontaneous and full of energy. Seeing people rock out and do air guitar during Dr. Brandi Stankovic's keynote address was hilarious!

My track for New Orleans was law firm security and hacking prevention, while the Las Vegas track was on embracing diversity by preventing (workplace) harassment along with the wage and hour update.

Attending the Active Shooter Response for Law Firms session was eye-opening (and frightening). It made me realize just how important security measures are for law firms. We no longer can say “that could never happen here.”

Although the conferences were all day long and chock-full of information, there was still time to let loose and enjoy what the cities offered by way of entertainment. Suffice to say, I had a great time!



Aly Lynch, me, Karen Godfrey



Did I win, did I lose...I'll never tell!



Chicory coffee and beignets
Café du Monde



Business of Law Conferences

By: **Laura Shaw**
Rudolph & Associates LLC

Have you been to a Business of Law conference yet? At the end of October, I attended my first Business of Law conference in Las Vegas. I have previously attended four of the national conferences and have always enjoyed them, but I will admit, I may have to consider mixing it up every year or so!

One of my favorite sessions, “Legal Administrator’s Success Toolkit: 7 Proven Strategies to Grow Your Firm & Take Back Your Life,” hit a bit close to home, message received and definitely valuable!

The best part was the overall feeling I left with. I definitely enjoyed the smaller, more intimate, sessions that allowed me to get to know individuals rather than the large groups that are at nationals. The vendors are definitely better at the national conferences, which surprised me. I was looking forward to the opportunity to be someone they wanted to talk to “from a small firm setting” and sadly it was the same that I experienced at the national conferences, most had no desire to speak with someone who only had five attorneys on staff. Oh well, I will stick with our Legal Expo for my exposure to vendors that better suit my needs!

I truly enjoyed the conference and thought the topics were well rounded. Only on two occasions did I have a conflict where I

wanted to sit in on two sessions that were at the same time: one I ended up about 15 minutes into it, moving to the other one and was happy I did, and the other I sat in the first one I went to and just missed the other.

For those that haven’t tried it yet—go to a Business of Law conference—with a choice of three different locations each year, the thing that was coolest is the presentations were the same no matter which one you went to. So, for instance, Kim Ayers went to the New Orleans conference, and she had the same keynote speaker and session opportunities that I did!



Laura Shaw, Terry Fator, Rich York



Laura Shaw and Sigfried Fischbacher

The Era of Lean Training



By: Doug Striker
Savvy Training & Consulting

Finally, things are turning around for your small- to mid-sized firm. You weathered the recession, though not without bruises, and you are turning a corner. Business is picking up, you're hiring again and everyone's working at top speed. This feels good!

In fact, everyone is working so hard that it feels like there's no room for any other priorities, such as training. (Besides, who has the money to commit to training? Your first priority is to build the firm and get those clients in the door!)

The truth is – you still need training. In fact, you may need it now more than ever. But, there are many, many ways to conduct regular, effective training programs that don't cost your firm an arm and a leg.

This is the era of lean training: When you marry technology with a culture of accountability, you can conduct a highly

effective training program for far less than you might imagine.

But first... why is ongoing training important? Because, my friends, times have changed.

Why Training is More Important than Ever

Our clients have far more power than they used to have. The recession made clients much more savvy and diligent when it comes to hiring legal help, including the way they are willing to pay (fee agreements) and how much they are willing to pay. Simply put: Our clients hold the aces and we must play to their hand.

Think about it from a client's perspective: They may be interested in your firm because of the outstanding legal minds that you offer. But their next question is, "How will you charge me for your time?" Why should clients pay top dollar for a superstar lawyer when half his time is spent trying to figure out how to format a Word document?

Now, from a firm's perspective, if clients are smart enough to ask about efficiencies, there is an immediate, bottom-line value in assuring that everyone is tech-savvy and moving at top speed.

Lean Training = Technology + Culture

So, you need to make sure that your team is efficient... but you don't want to

(can't!) spend a fortune to launch and maintain an impactful training program.

That's ok! All you need is to outline a consistent system to manage your training program and utilize cheaper technologies and products to deliver it. In a nutshell: Get organized and deliver!

Here are a few tips to get you started:

- ◆ Create a Performance Improvement Plan (PIP): This plan must include annual training expectations of attorneys and staff with consequences for nonparticipation. Whether you expect monthly, bi-monthly, quarterly or twice-a-year participation, those expectations must be outlined and shared with everyone in the firm. Likewise, your plan needs to include the ability to track improvements. (Technology can help with this. Read on.)
- ◆ Automate scheduling and participation: Don't leave sticky notes on desks to remind people to attend a training! Every calendar available today (i.e. Outlook) includes the ability to schedule and remind people of trainings. You don't have to be a nag and this doesn't have to be personal. If your expectations are properly communicated, then let technology schedule and remind people of their obligations.
- ◆ Don't waste your staff's time: One size does not fit all. People with advanced



skills should not have to sit through remedial content just to say that they had attended a training. Today's Learning Management Systems (LMS) offer individualized assessments, targeted course content and interactive webinar programs for a fraction of the cost of in-person trainings. Note: look for an LMS that provides reports down to each class that a person takes and assessments on their skill level. (I address this more later in the article.)

- ◆ Maximize your dollars: Think dollars-per-person trained. If you have to fly someone to a training that costs \$1000 per day, you also need to factor in travel, hotel, food and the cost of that person's time out of the office. You could quickly hit \$5000 to train one person. But, you can offer a two- to five-hour webinar training for \$500, often training multiple people at once. Or, if you need more specialized training for a big group, fly the trainer to you.
- ◆ Watch for flashpoints: Be on the hunt for those moments when something goes wrong and you suddenly have a teachable moment. Your training becomes much more effective when you are addressing actual needs in your firm.

A couple more hints to save money and maximize your efforts:

- ◆ Get intensive: When you have to train a large group on the same

[Go to Page 2](#)

skills, fly the trainer to you and condense your time commitment. For example, if it would take five weeks of webinar trainings for each person to learn the desired skills, bring the trainer to your firm and condense the training into five intensive days.

- ◆ Record your in-person trainings: Record any live sessions that you pay for and load those videos into your LMS. Then, as new people join your firm, you can train them for pennies.

The LMS: The Mac-Daddy of Your Training Program

Finally, as you can probably tell from all the information I shared above, the Learning Management System is your key to organizing and maintaining an effective training program. But, the last time you checked, those systems were cost-prohibitive, right?

Well, training companies are (or should be) getting smarter, too. Yes, there are still companies out there that will charge a fortune for customized learning management system platforms, and then they will take your other arm and leg for the actual training content that you need in order to make the platform useful at all.

But that's not for you. You are a small to mid-size firm and you need an affordable LMS. Here are the capabilities that you can and should expect in an LMS:

- ◆ Both a state-of-the-art, intuitive delivery system as well as rich,

continuously updated content – at an affordable price. Prior to now, clients had to purchase an LMS and the content separately and usually they paid a very high cost for both.

- ◆ Off-site hosting and 24/7/365 support.
- ◆ Trackable, reportable data down to each individual user.
- ◆ Access to a social network of subscribers who continuously discuss challenges, ideas and successes that they are facing in their firms.
- ◆ Complete control and customization opportunities for trainers and administrators who need to tailor their continuing education to individual attorneys, from new hires to seasoned legal eagles.

Yes, you can find such a robust LMS for a fraction of the cost that giant law firms pay.

Lean Training: Your Edge in a Competitive Environment

While it may seem that no one in your firm has time for trainings (and that you don't have time to plan and manage it), this step could very well be the edge that helps you ride today's busy wave for much longer than you otherwise could.

As I said earlier, now is the time to get organized and deliver!

Doug Striker is CEO of Savvy Training & Consulting, a leading provider of legal software training solutions. As a former COO of a prominent law firm, he specializes in helping firms acquire the software platforms they need, training staff for maximum workflow efficiency, and enhancing continuity and bottom-line results. Previously published in Greater Chicago Chapter of ALA's Administrators' Advantage Newsletter.

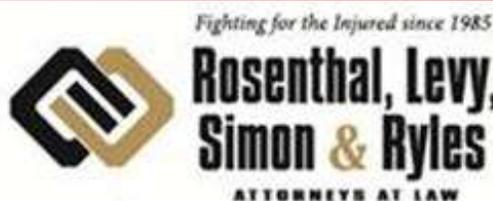
Member News!



Attorney Peter Hunt was selected to be a panelist at the Oct. 30th New Attorney Breakfast. There are over 80-new attorneys expected to be in attendance.

Florida Registered Paralegal Debra Staley was asked to serve as a panelist at the February 2016 CLE Ethics Webinar for Paralegals.

Congrats to both of these individuals for their recognition in professionalism and excellence.



The firm is pleased to announce that senior shareholder, founder, and philanthropist Gerry Rosenthal has been honored with the Michael Rucka Lifetime Achievement Award by The National Workers' Injury Law & Advocacy Group (WILG).



Day Pitney is pleased to announce that it will expand its East Coast presence through a merger with Florida-based law firm Chapin, Ballerano & Cheslack. Seven attorneys will join the firm's Trusts and Estates and Corporate practices once the merger is completed on January 1, 2016.



Congratulations to Luis Sosa, who has been elected as a Board Member of the Palm Beach County Hispanic Bar Association. Born in Cuba, Mr. Sosa speaks fluent Spanish and is able to assist those who are seeking justice.



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October

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Judith H. Pawloski

Edwin A. Ratka

Wendel Scott

Laura Shaw

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A T T E N T I O N

Firm Administrators: Don't Call Anyone for Computer Support Until You Read This...

Not all computer consultants are created equal! The question is which ones will give you honest service and keep their promises, and which ones will take advantage of you like an unethical auto mechanic and possibly make things *WORSE*?

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The Association of Legal Administrators (ALA) was formed in 1971 to provide support to professionals involved in the management of law firms, corporate legal departments and government legal agencies. ALA provides educational opportunities and services to more than 10,000 members representing more than 5,300 employers in 21 countries. ALA is structured into six regions with more than 100 chapters in the United States, Puerto Rico, Canada and New Zealand.

ALA’s mission is to improve the quality of management in legal services organizations; promote and enhance the competence and professionalism of legal administrators and all members of the management team. The Association’s members are law office administrators who manage such areas as finance, human resources, systems and technology, facilities, marketing and practice development.

BOARD OF DIRECTORS

- Susan Goldstein, President
- Michele Parcels, Vice President
- Kim Ayers, Treasurer
- Laura Shaw, Secretary
- Sue Recchia, Immediate Past President
- Debbie Giordano, Past President

Membership Information

Dina Lotz
 Membership Chair
 (561) 625-8311
 DLotz@Labovick.com

Calendar of Events

- September 10-12 Business of Law Central-New Orleans, LA
- September 16, 2015 Attorney Appreciation Luncheon - Dr. Henry
- September 22, 2015 Board Meeting
- October 1-3, 2015 Business of Law East-Atlanta, GA
- October 6, 2015 Members Only Happy Hour at Duffy’s
- October 13, 2015 Member Meeting
- October 22-24, 2015 Business of Law West –Las Vegas, NV
- October 27, 2015 Board Meeting
- November 7, 2014 Habitat for Humanity Community Event
- November 10, 2015 Member Meeting
- November 24, 2015 Board Meeting
- December 8, 2015 Holiday Party at Palm Beach Zoo!



Visit our website!
www.pbcala.org

If you have news you’d like to see included in the newsletter, please email geh@flappellatelaw.com