INTRODUCTION:

Over the past 40 years, a combination of engineers, technologists, educators and others collaborated to adapt basic design method concepts to create design thinking. Using the design thinking stages of empathizing, defining, ideating, prototyping and testing, this problem-solving method is critical for practitioners to find improvements to legal service delivery, become more innovative, and increase collaboration across the legal ecosystem.

This solutions booklet provides the legal industry with the winning results and others from each of the four “how might we” positioning questions and a sample of the experience from the 2019 Association of Legal Administrators’ C4 Conference (Connect, Collaborate, Create, Change).
The group details the various resources required for their solution:

- **Human resources:** N/A
- **Financial resources:** N/A
- **Technology resources:** Software that links between Outlook and document management application
- **Operations resources:** Some administrative time to review reports that show those clients who have not acknowledged receipt of status updates or show unanswered email requests by attorneys
- **Marketing resources:** N/A

The group describes any other solutions that they considered or prototyped but ultimately did not select:

At first, we were focused on both the client and attorneys as end users and eventually just focused on the client as the end user.
**Winning Group Name:** Client E

Client E was the overall winning solution for this C4 Conference. Please refer to page 3 to read their complete solution.

**Project Name:** Client E: A Communications Solution for Law Firms

**Group Members:** Rhonda Fagen, Office Manager at McAngus Goudelock & Courie, LLC, in Raleigh, North Carolina; Brauna Doidge, Director of Administration at McCauley Lyman in Framingham, Massachusetts; and Edgard Delgado, Firm Administrator at Gladstone & Weissman, PA, in Boca Raton, Florida

**Summary:** As work is done and progress is made in a matter, clients receive an automated email update that tells them what the update is, allows them to view documents, and gives them options to communicate with the attorney according to their preference. Communication options include an in-person meeting, phone call, email or only an acknowledgment of receipt. The client can schedule an in-person meeting or phone conference directly from the status update email.

**Group Name:** MAP: Management & Productivity

**Project Name:** MAP: Management & Productivity

**Group Members:** Beth Baughman, CLM, PHR, Administration Manager at Fisher & Phillips LLP in Atlanta, Georgia; Richard Gibson, Director of Office Administration at Ropes & Gray LLP in Washington, D.C.; Arleen Davidenko, Tampa Office Administrator at Bradley in Lutz, Florida; and Bev O’Reilly, Firm Administrator at Conn Kavanaugh Rosenthal Peisch & Ford, LLP, in Boston, Massachusetts

**Problem statement:** How might we as administrators help our managing partner(s) manage the firm and focus the practice of law?

**Summary:** Time is a precious commodity in a firm, especially for a managing partner. This group zeroed in on finding a way to help managing partners focus on managing the firm and the practice of law. Their solution was to develop a dashboard that provides metrics and data on the managing partner’s activity as compared to the expected level of contribution and value of alignment of strategic goals. The group explored some other ideas, including creating an invoice for the managing partner’s time billed to the firm, establishing a hotline for important calls, and developing a prescreening process for partner issues. In the end, the dashboard was chosen, as time expended would be captured through the existing time-entry system using predetermined categories judged for value and qualified for strategic alignment. The metrics would then be available to the managing partner and a variety of constituents and stakeholders.

**CHAPTER ONE: CLIENT EXPERIENCE**

How might we better understand the client and create more collaborative partnerships between firms and clients that lead to improved client service and business success?
Group Name: Client Experience

Group Members: Dan Arntsen, Client Success Manager at Affinity Consulting Group, Mount Horeb, Wisconsin; Lora Files, Firm Administrator at Marlowe McNabb Machnik, PA, in Tampa, Florida; Elyssa Goldstein, CLM, PHR, SHRM-CP, Firm Administrator at Rebenack Aronow & Mascolo, LLP, in New Brunswick, New Jersey; and Kathy Hubbard, Firm Administrator at Madigan Dahl & Harlan, PA, in Minneapolis, Minnesota

Problem statement: How do we clarify expectations with regard to engagement for new clients?

Summary: This group created a roadmap to clarify new client expectations with regard to engagement. They would put all the fundamentals in one place for the client by detailing the scope of work, points of contact, methods and timelines of communications, pricing and budget, and client responsibilities. With the roadmap in place, new clients would be introduced to the concept through an explanatory video. The group also considered adding an intake step for clients, but they determined it was too broad. Plus, they wanted to focus on the client as the user, not the firm or attorney.

“\nI was skeptical at first, but in a good way. After going through all the steps to completion, though, I am a convert and design thinking is a tool I will use at my firm. The team breakouts and presentation were much more interesting — and memorable — than anyone’s slide deck. I learned how each of the team members did it at their firm. The problems/topics were great. It is what we are all thinking about. The hackathon format is great! We all got to play to our strengths — and find out how to deal with our weaknesses.”

Douglas Gibson, Director of Information & Legal Support, Chaffetz Lindsey LLP, New York, New York (team Skin in the Game)
CHAPTER TWO: EMPLOYEE LIFE CYCLE

How might we emphasize the many benefits of diverse perspectives and inclusive culture throughout the employee life cycle to the maximum benefit of the employee and the firm? (The life cycle ranges from recruiting and onboarding to advancement and offboarding.)

Winning Group Name: The LEAPS

Project Name: LEAP

Group Members: Ann Stolte, Administrator of Human Resources and Planning at Schuchat Cook & Werner in St. Louis, Missouri; Kurtis Shepherd, Employee Benefits Specialist at GLJ Benefit Consultants; and Caden Johnson, GLJ Benefit Consultants

Problem statement: How might we attract young college graduates into legal support roles? Our end user is the Generation Z college graduate looking for an entry-level position with a good salary and growth opportunities.

The group describes their solution: Law firm support roles are changing because of the new generation of lawyers who need less clerical and administrative help. We sought to create a role that is a bridge between the traditional legal secretary role and the future, which probably won’t include a legal secretary. The legal practice specialist role serves as a bridge to provide seasoned partners the clerical support they need and functions as an entry-level way for college graduates to join a law firm and grow their careers.

The group describes any other solutions that they considered or prototyped but ultimately did not select: Expanded benefits package that aligns to Gen Z and Millennial values, such as jeans at work and bring-your-pet-to-work day, remote working and meditation room. We discussed law firm cultural attributes that are attractive to Gen Z, which include firm values and corporate social responsibility. While both of these solutions are important to job applicants, we felt our current solution in the form of a job description was an earlier step in the attraction process.

The group details the various resources required for their solution:

» Human resources: Draft job description, post it, create plan to partner with local colleges to attract applicants, investment in time for selection and interviewing

» Financial resources: $60,000 in salary and benefits plus $2,000 in marketing materials, including on-campus reception to attract applicants and recruiting costs

» Technology resources: N/A

» Operations resources: Someone to help plan reception on campus or other venue

» Marketing resources: $2,000 for creation and production of video, creation of brochure and banner and printing costs

How might we emphasize the many benefits of diverse perspectives and inclusive culture throughout the employee life cycle to the maximum benefit of the employee and the firm? (The life cycle ranges from recruiting and onboarding to advancement and offboarding.)
The group explains what they learned by empathizing with their users: During the iteration process of our prototype, we learned that we needed to address the intimidation factor of working in a law firm. We needed to define what flexibility meant to Gen Z college graduates. We also learned the idea of being guided, taught and set up for success in the role. Finally, we learned that it was important to provide a timeline for growth, promotion and salary increases.

The group redefined their problem statement because they had to narrow the problem statement significantly and determine what professional group to focus on (i.e., legal support, attorneys, etc.).

The group describes how they tested the prototypes: We sought input on our draft job description from five Gen Z college graduates and received responses from all of them. We adjusted our prototype to reflect their feedback.

The group’s message to the legal industry about what they learned about their users through this process: Young people find law firms intimidating places to work, and the law firm employees all are responsible for creating a welcoming environment in order to attract and retain Gen Z college grads.

Group Name: Inclusion Solutions

Group Members: Nicole Caccamo, Executive Director of Ryan Ryan Deluca, LLP, in Bridgeport, Connecticut; Corry Johnson, Principal at GLJ Financial; Viviana Llanos-Laut, Office Manager/Legal Secretary at Lewis Baach Kaufmann Middlemiss PLLC in New York, New York; Patti Sheehan, Office Administrator at Hinshaw & Culbertson, LLP, in Boston, Massachusetts; and Melissa Hansen, Administrator at Shumaker in Tampa, Florida

Problem statement: How might we welcome a diverse candidate on their first day and help them feel more welcome and included?

Summary: Inclusion Solutions’ goal was to find a way to foster inclusion and engagement with new hires. To achieve this, their proposed solution was to create a new hire welcome video that would be the start of working to achieve higher levels of satisfaction and integration for new employees. The team also considered a written 60-day onboarding program. In the end, the video won out as it had the potential to incorporate the thoughts and experiences of our existing employees in a way that a written program could not do.
DUTIES TO INCLUDE:

- Review and edit documents.
- Research court protocol at the federal, state and local level.
- Assist with electronic filings in court systems.
- Communicate with client and collect documents for production in litigation.
- Coordinate meetings and special office events.
- Assist other support staff with travel and be available to back up assistants to attorneys.
- Maintain deadline calendar and send reminders to attorneys.
- Assist with additional projects as necessary.

JOIN US IF YOU HAVE:

- College degree and demonstrated academic excellence.
- Good research and writing skills.
- Ability to take ownership of projects and handle multiple projects simultaneously.
- Demonstrated writing ability and excellent grammar, spelling and proofreading skills.
- Excellent communication and interpersonal skills, including the ability to maintain effective working relationships and communicate verbally and in writing in a professional, courteous manner with clients, firm members and other business contacts.
- Ability to interact with lawyers, clients and staff at all levels.
- Demonstrated proficiency with MS Office Products required (i.e., Microsoft Word, PowerPoint, Outlook and Excel); CRM technology a plus.
- Ability to pay close attention to detail and be highly organized and accurate.
- Previous experience in the media/entertainment sector or in a law firm or professional services organization, supporting a multi-office environment, is preferred.
- General familiarity with the practice of law is a plus.

We are an equal opportunity employer.
CHAPTER 3: PRICING AND PROFITABILITY

How might we identify the necessary data and insights, as well as develop and evangelize best practices, to improve pricing and profitability in any law firm?

Winning Group Name: Team Moneyball

Project Name: Profit Karma

Group Members: Chris Holmes, CLM, Director of Finance and Administration at Hackett Feinberg, PC, in Boston, Massachusetts; Kevin Harris, Project Manager at Orion Law Management Systems, Inc., Atlanta, Georgia; Ana Helton, Office Manager at Riggs & Ray PC in Austin, Texas; and Debra Elsbury, CLM, Firm Administrator at Threlkeld Stevenson in Indianapolis, Indiana

Problem statement: How might we identify the necessary data and insights as well as develop and evangelize best practices to improve pricing and profitability in any law firm?

The group describes their solution: Our solution was Profit Karma, an app for timekeepers offering real-time access to their impact on profitability. At the touch of a button, real-time metrics are available to be personalized.

The group details the various resources required for their solution:

- **Human resources:** Profitability Communication Officer and potentially additional IT support.
- **Financial resources:** Compensation for the Profitability Communication Officer. Pay for app. Purchase incentive item(s).
- **Technology resources:** App development and support.
- **Operations resources:** Workspace for Profitability Communication Officer.
- **Marketing resources:** Internal marketing promotion of value of information.

The group describes any other solutions that they considered or prototyped but ultimately did not select:

- Posting information in the kitchen — not worthwhile.
- Paper report — not timely and hard to understand.
- Using benchmarking — while it is a tool, it varies from firm to firm and department to department. It’s too general in nature.
- Gamification — not incentive for everyone; as a tool by itself, it is sufficient. Assigned to the Profitability Officer to implement as needed.
- Incentive-based reward system — not a standalone option. Assigned as a program Profitability Officer can implement.
Group Name: Sunsetting the Billable Hour

Group Members: Karen Griggs, CLM, Executive Director of Baker Sterchi Coden & Rice, LLC, in Kansas City, Missouri; Josh Stuckart, CLM, Legal Administrator at Cornell & Gollub in Boston, Massachusetts; Chris O’Sullivan, CLM, Chief Financial Officer and Firm Administrator at Gesmer Updegrove, LLP, in Boston, Massachusetts; and Gretchen Pratt, Executive Director of Morse Barnes-Brown & Pendleton, PC, in Waltham, Massachusetts

Problem statement: Inability to accurately capture 100% of the billable hour

Summary: Team Sunsetting the Billable Hour worked to solve the challenge of accurately capturing 100% of the billable hour. In their review, they discovered that replacing the billable hour system with a project-based pricing model would provide the firm administrator with a more efficient, accurate and reliable billing method, resulting in fewer write-offs and write-downs and less time spent chasing down timekeepers. They recognized that the predictability of project-based billing is a win-win for the administrator, the firm and the client. During their research, they thought of other solutions to maximize the capture of billable hours: incentivizing (financial rewards and gamification), punishment (fines and negative employment impact) and daily monitoring and reporting. These solutions were not selected because they did not significantly improve time capture and required many additional administrative resources.

Group Name: Time Value Vixens

Group Members: Lori Kannenberg-Dorn, CLM, Director of Administration at Stafford Rosenbaum LLP in Madison, Wisconsin; Kim McMahon, CLM, Chief Operating Officer at Bove & Langa, PC, in Boston, Massachusetts; Megan Pluviose, Executive Director of Murphy & King, PC, in Boston, Massachusetts, and Annette Roe, Chief Administrative Officer at Greenberg Glusker Fields Claman & Machtinger LLP in Los Angeles, California

Problem statement: How might we help managing partners identify and measure timekeeper inefficiency data to improve profitability of the firm?

Summary: Team Time Value Vixens asked the question: How might we help managing partners identify and measure timekeeper inefficiency data to improve profitability of the firm? They discovered and are creating a software program — patent pending — that collects matter data at the conclusion of a matter (“postmortem”) to report on various data points, allowing for benchmarking data to be created by practice/matter/task type using ALA’s Uniform Process Based Management System (UPBMS) coding.

This benchmarking data can be used to identify inefficiencies that negatively impact profitability, such as poor use of timekeeper/task resources or write-downs and write-offs necessitated by improper staffing. They also considered two other solutions:

1. Hiring of an individual person who will gather post-matter feedback, both internally and from clients, to provide similar information. Dismissed based on concerns of overhead for a new staff position and whether that overhead would be more than covered by any profitability increase.

2. Internal intranet reporting system showing timekeepers their profitability numbers. Dismissed based on concerns over the creation of a culture of competition and the morale of associates who have less control over their write-off and write-down numbers.

Ultimately, the plan for the software program was the most effective solution.

Group Name: Profitability Maximization System (PMS)

Group Members: Gloria Lara, Executive Director of Fitzgerald & Co., LLC, in Boston, Massachusetts; Stephen Wolf, CLM, CPA, Chief Operating Officer at Deutsch Kerrigan, LLP, in New Orleans, Louisiana; Allison Sponic, Office Administrator at Kang Haggerty & Fetbroyt LLC in Philadelphia, Pennsylvania; and Christine Giles, Office Administrator at Bollier Ciccone, LLP, in Austin, Texas

Problem statement: Originating attorneys lack information to maximize profit and maintain appropriate pricing.

Summary: Team Profitability Maximization System (PMS) worked to address the issue that originating attorneys often lack information to maximize profit and maintain appropriate pricing. Their solution is a seven-step process designed to eliminate unprofitable clients or matters that are detrimental to overall profitability. They discovered that this process provides a feedback mechanism to the originating attorney on results and profitability of a matter as well as client satisfaction. By working with profitable, happy clients, they will create growth and a stronger referral system.
CHAPTER 4: NONTRADITIONAL LAW FIRM

How might we reshape the narrative about the definition of lawyering and the provision of legal services to benefit legal professionals?

Winning Group Name: Whole Brain Law

Project Name: Remote Worker

Group Members: Ryan Conlan, National Sales Manager, Legal Practice, at All Covered, Irvine, California; Randy James, Office Administrator at Verrill Dana LLP in Boston, Massachusetts; Nick Ypsilantis, President and Chief Executive Officer of Accufile, Boston, Massachusetts; Jacqueline Glade, Firm Administrator at Harris Hunt & Derr, PA, in Tampa, Florida; and Lisa Pecina, CLM, Support Services Manager at Shook Hardy & Bacon, LLP, in Kansas City, Missouri

Problem statement: Attorneys only spend 30% of their time on critical thinking.

The group describes their solution:

Work flexibility — Ability to work remotely but have dedicated workspace.

Remote workers — Ability to work four-day work week (10 hours per day).

Eliminating distractions — Ability to limit distractions by having two hours of uninterrupted work time.

The group details the various resources required for their solution:

» Human resources: Myers-Briggs personality test for cultural fit.

» Financial resources: Training, technology, office space, perks/benefits.

» Technology resources: Remote resources for everyone, work from anywhere from any device.

» Operations resources: Democratic approach to culture. Support teams available 24/7. Approachable and available leadership.

» Marketing resources: Marketing campaign “Law Firm of the Future” that highlights work-life balance, benefits, flexibility, resources, support, mentorship and collaboration.

The group describes any other solutions that they considered or prototyped but ultimately did not select:

We considered giving options for entirely remote workers. Market research with interviews and social media demonstrated a lack of interest in an all-remote workforce from everyone from Millennials to Baby Boomers. They wanted a place to go to be a part of a team and collaborate with peers. They wanted a sense of belonging.
The group explains what they learned by empathizing with their users: We learned that every worker is in a unique place in their life and we need to provide options to best accommodate their productivity.

The group did not redefine their problem statement, but we redefined some of the solutions based on feedback and market research.

The group developed the following prototypes:
Four-day work week (10 hours per day) and 100% remote options.

The group describes how they tested these prototypes: Social media and in-person interviews.

The group’s message to the legal industry about what they learned about their users through this process:
Everyone works their best given flexibility and empowerment.

Group Name: Bridges: Connecting the Past to the Future

Group Members: Kimberly Ayers, Chief Administrative Officer at Lewis Longman & Walker, PA, in West Palm Beach, Florida; Joe Kelley, Chief Financial Officer at Jackson Lewis PC in West Harrison, New York; Diane Longobardi, Records Management Coordinator at Mirick O’Connell DeMallie & Lougee, LLP, in Worcester, Massachusetts; and Maria Bruno Warner, Director of Human Resources at Nutter McClennen & Fish, LLP, in Boston, Massachusetts

Problem statement: Get traditional shareholders to accept nontraditional attorneys in order to sustain the firm.

Summary: Bridges: Connecting the Past to the Future worked to find a way to get traditional shareholders to accept nontraditional attorneys in order to sustain the law firm. They wanted to develop an incentive plan to facilitate the transition of clients to younger shareholders. The team drafted a seven-question survey to discuss “Your Legal Practice” wherein the questions addressed issues like sustainability, the firm’s guidelines for mentoring programs and becoming a partner, and whether the respondents understood the firm’s partnership structure. They used this information to develop a plan for a mutually beneficial agreement for the attorneys involved in the transition, including incentives and gamification and other support. At the same time, they discussed developing emotional support for the transition including opportunities for charitable work or serving on nonprofit boards or work at colleges and universities where they can share their expertise. During their discussion, they considered facilitated discussions between senior shareholders and junior shareholders as well. They ultimately found the survey to give them the best plan.

Group Name: Skin in the Game, LLP

Group Members: Doug Gibson, Director of Information at Chaffetz Lindsey, LLP, in New York, New York; Bob Horne, Strategic Account Manager, iSolved HCM, Boston, Massachusetts; Rich Wilson, Founder and Filmmaker at VIBE; Lisa Clark, Program Administrator at Legal Aid of Western Missouri in Kansas City, Missouri; and Daniel McCormack, Chief Executive Officer, Dan McCormack & Associates, LLP, Saugus, Massachusetts

Problem statement: How can lawyers evolve and provide service that satisfies client expectations and benefits the legal profession?

Summary: Skin in the Game, LLP, looked to solve the question of how lawyers can evolve and provide service that satisfies client expectations and benefits the legal profession. Their solution was to transform the client engagement letter to reflect the four key focuses that will evolve legal professionals’ approach to client services. They four key focuses include:

» Success Rate: You are not alone. Public record of similar casework. What we have done and how we model it.

» Approachability: Priority and clear communication build trust. Collaboration opportunity to build teamwork. Stop/pause and agreement on our progress at each billing.

» Knowledge and Development: Talent management, technology and branding, and expert case knowledge.

» Return on Investment: Project management budget, retention within firm and of clients, and engagement and incentive.

These focuses will create a relationship that will increase retention of staff and current clients, as well as bring in new clients and revenue. The team also considered solutions like training, development and technology. However, the appearance of the engagement letter brought all of those things together to create a complete map to the future of lawyering.
Thank You to Our C4 Business Partners!

Their support was vital to the success of this new conference

ALA would like to express our appreciation to the business partners who sponsored the inaugural C4 The Legal Industry™ Conference, which happened last week in Boston, Massachusetts. Their support was critical not only because it helped ALA put on the best conference possible but also because their participation as subject matter experts contributed to the design-thinking-driven solutions to complex legal industry issues that the C4 Conference was created to discover.

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CONCLUSION

There are few truly collaborative workshops designed to engage various sectors in the business of law to drive solutions to the challenges facing the legal industry. This annual conference is immersive and interactive experience, resulting in prototypes and strategies to address the identified problem. Join ALA’s next C4 (Connect, Collaborate, Create, Change) Conference on October 27–28, 2020, in San Diego, California. Disrupt the status quo and come together to solve legal problems!

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