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JER-Z-JOURNAL

A Quarterly Publication

It's All About The People

ON THE COVER

Administrators know the vital role the employees play in the success of a law firm. In this issue, we include articles on understanding generational differences and creating a healthy workspace.

JER-Z-JOURNAL

IN THIS ISSUE

It's All About The People

By Mary Ellen Dolan

When I sat down to write this article I realized that by the time you read this, I will be serving in my new role as the Past President of NJALA. I am one of the few Presidents, if not the only one, who has had the honor to serve for a term longer than the standard one year because we adjusted our fiscal year to match that of ALA. All of our current Board members agreed to serve longer terms in their current roles in order to help with this transition. Thus, my term lasted nearly two years and this will serve as my last President's Message.

As I reflect back having become a member in 2008, never could I have imagined how rewarding my membership would be both professionally and, more importantly, personally. I never dreamed of the opportunities I would be afforded as a member. The knowledge of my colleagues, sharing of ideas, and support we offer each other, is truly astounding and I look forward to continuing to work with and support each of you for many years to come.

It goes without saying that our colleagues can offer us a wealth of information and no matter the question you ask or advice you seek, someone is always there to help. I know I am stating the obvious but it is worth repeating because it is you, our members, who make this organization so rewarding and beneficial.

To make our organization so special, it takes an amazing group of individuals. Of course, I am referring to our Board of Trustees and other volunteers who maintain the tradition of excellence set for us by many who served before us.

When I wrote my first President's message, I encouraged you to Strive for Gold. We had just witnessed amazing performances from numerous athletes in the Summer Olympics and ironically, as I pass the gavel, we are about to embark on the Winter Olympics. I am optimistic that the United States team will once again shine and, hopefully, bring home many gold medals. However, if by chance they fall short, I can be proud because I have been lucky enough to have served on our own champion team and each member deserves a gold medal for his or her efforts. Their dedication and loyalty to this organization is to be commended.

The Officers and Trustees have worked tirelessly to make this NJALA Board a successful one. Audrey Serban hit the ground running to insure we had excellent educational programs which I feel she achieved. Robbin Dolan took on the monumental task of increasing our membership and I am happy to report that she continues to bring new members in each month. In addition, she recently became the Co-Editor of the NJALA's newsletter. Doreen Marino has held the position of Secretary and also is the Co-Editor of the newsletter. It's no easy task to handle these roles and she has done an excellent job. Michael Harrison has done great job handling the Treasurer duties for the organization. Gayle Englert served as our Past President and was a tremendous help to me and she was always willing to pitch in wherever needed.

The Trustees are comprised of Mitchell Rait, Jim Van Leir, Mary Beth Donaghue, Louise Ruffo, Kurt Brown, Fran Puntillo, Nancy Harris, Teri Siegle, Jim Wostbrock and Jackie Pampinella. They each contributed by working on committees, community challenge initiatives, assisting with our Business Partner program and the Business Partner Expo, updating our website, and helping out wherever needed. In my view this team won "the Gold" and I thank each of them for their contributions.

The last twenty-one months have been such an incredibly rewarding experience for me and I am honored to have served on this award-winning team of Champions. One last time, I encourage you to volunteer further and become a part of this experience. You will not be sorry that you did.

Mary Ellen Dolan is the Office Administrator of Greenberg Traurig, LLP in Florham Park


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BEST PRACTICES: SETTING UP CHECKS AND BALANCES FOR LAW FIRMS

BY KENNETH E. WINSLOW

In today's business environment, in order to limit exposure to fraud and defalcation risk from within the firm and third parties outside the Firm, law firms must institute sufficient oversight of financial operations, along with checks and balances. These best practices are essential to a well-managed operation.

Below is a best practice checklist to assist you in reviewing your Firm's own checks and balances:

- Check signing
- Electronic payments
- Bank credit agreements
- Bank statements
- Accounts Payable and Vendor Transactions; Policies and Procedures
- Vendor Changes
- Credit Card Accounts
- Payroll; paychecks/direct deposits; periodic reports; payroll tax payments; payroll service and employee leasing companies
- Attorney trust accounts

Banking Related Matters

Check Signing

With regard to check signing controls, all disbursement requests in the form of check or electronic remittance, must be accompanied by an original invoice or requisition, together with support, for the review and approval for the expenditure. No check is to be prepared in advance. No blank checks are to be signed, without exception. The Firm must limit and/or restrict the use of manual handwritten checks. The signed checks must be mailed by someone other than the preparer. Specific signer responsibilities must be determined based the type of expenditure and dollar amount of the check. Certain checks may require more than a single signature. Firms must limit and control the use of signature stamps.

Electronic payments

For electronic payment processing, a designated computer should be used to access accounts. A segregated account with limited funding should be considered to process the payments and activity must be monitored on a daily basis to ensure payments have been transmitted and accepted.

Bank Credit Agreements

For companies that borrow and repay under bank credit line agreements, all borrowing and repayment requests must be made by designated signers and approvers. All transaction processing must include a disclosure of the current debt balance, and all transaction processing must be acknowledged by a bank officer via email or phone.

Bank statements

Oversight of bank activity must occur more often than at the end of the month upon receipt of the bank statement. Designated signers/approvers must be provided separate electronic access to the bank account to allow for independent review and oversight of bank activity throughout the month. Paper statements must be delivered to a responsible signer for review and subsequent delivery to staff responsible for reconciliation and maintenance of the accounting records.

Accounts Payable and Vendors Transactions

Policies and Procedures

The Firm must develop written policies and control procedures and provide sufficient oversight and training in support of its policies. The vendor database should be reviewed on a periodic basis for duplicate vendors, addresses, and inactive vendors. All duplicate vendors and addresses must be investigated, corrected and/or removed. Old vendors that have history to be maintained must be marked as inactive so that no additional postings can be recorded in the vendor record. When approving invoices, designate different approvers depending on expenditure type (e.g., office supply, information technology). Periodically, request bids from other vendors to check the pricing and product quality and/or service.

Vendor Changes

Restrict access to add or change vendors in the system. Request documentation and approval for the changes and additions, such as correspondence on letterhead, business card, email address, website, and indicate any firm relation.

Credit Card Accounts

For credit card vendors, review the name, address, and account numbers. Restrict credit card vendors to Firm credit card accounts *only*. Assign one person as approver for all credit card purchases. Require an invoice or purchase request form for all credit card charges.

Payroll Processing

Firms must secure paper and electronic payroll records and require written authorization for all changes from new hires,

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Best Practices
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terminations, and changes such as salary, bonus, and related employee information. Direct deposit authorizations must be in writing and include only employees or recipients with a company email. Terminated employees must be de-activated.

Periodic Reports, Payroll Tax Payments, and Employee Leasing Companies
Periodically, registers must be matched against an employee payroll roster containing base/average pay information. Annual payroll census data should be matched against expected payroll for fluctuations that may warrant further investigation.

Notification From Government Agencies
With regard to payroll service bureau tax filing and payment responsibilities, Firms must be included on all notifications from government agencies. Any power of attorney authorizations must provide for copies to be sent directly to the Firm. All notices and assessments from government agencies must be forwarded to the payroll service bureau for follow up and response. A written acknowledgement of the response and a subsequent resolution must be obtained from the government agency.

Attorney Trust Accounts

Despite knowledge of the law, required procedures, and the possibility of severe penalties including disbarment, a significant number of attorneys commit ethics violations every year. The Supreme Court of New Jersey's Office of Attorney Ethics Requirements under **RPC 1.15 and 1:21-6** outlines a series of mandatory practices to ensure the proper handling of Attorney Trust Accounts on the part of the fiduciary.

Reconciliations, Check Signing, Monitoring, Approvals, and Misappropriation
Firms must perform monthly reconciliations using the specified 3-Way Format which includes: (1) Book activity, (2) Reconciliation to Bank statement, and (3) Listing of Balances by client.

Other Requirements
Under the State's requirements all remaining client trust balances must be refunded, stale, dated checks must be researched and cleared, and unclaimed funds must be transferred to the State after making a sufficient effort to identify and locate the client.

By being proactive and instituting these checks and balances your Firm's internal operations will not only run smoother, but your exposure to fraud and defalcation risk will be greatly minimized from within and outside the Firm.

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Is Your Firm Properly Capitalized?

Knowing The Indicators and Having a Plan Are Key

By Richard Puzo

The business of practicing law is changing. Leaner economic times and cost-conscious clients are challenging traditional fee structures, which in turn affects how law firms manage their finances. Firms are not as profitable as they once were, the market is more competitive, and clients are more critical of traditional billing practices. It is no longer a matter of adding up billable hours. Clients want to know up front what their costs are going to be ahead of time.

These trends are prompting law firms to re-think their financial structures. In particular, many questions arise about the proper capitalization of law firms. Specifically, how do law firms determine how much capital they need and how do they obtain that capital?

All law firms need a certain amount of working capital—a reserve used to fund ongoing operations and the possible future expansion of the firm. This money is usually contributed by the partners. (This is different from long-term capital which is the money needed to acquire hard assets like computer systems. Long-term capital is usually sourced from bank loans or property/equipment leases.) The exact amount of working capital varies for each firm and can even change from year to year.

In the big picture, a firm's business strategy determines its need for working capital. So it's critical to start with a strategic plan, clearly outlining the partners' goals and objectives, including a timeline. Only then can a firm accurately forecast its capital needs and decide how to fund them.

A firm may plan to open two new offices, bring on five laterals, and upgrade its software in the coming two years, for example. In such a case, the firm needs a relatively high level of working capital. On the other hand, if a firm expects to maintain its current operating status and expense needs for the next few years, its working capital requirements may not be as high.

Items to Consider When Determining Capital Needs

When determining how much working capital your law firm needs, consider any gaps it may have in its cash flow. Most, if not all, businesses have gaps in time between client billings, payment of operating expenses, and collection of fees from clients. Examine the turnover of your accounts receivable, unbilled time, and accounts payable. This will help you determine capital needs specific to your firm's particular billing/expense/collections cycle. Working capital should also be enough to provide a cushion for common, ongoing expenses (overhead) as well as partner draws. In today's business climate, it is a good idea to have enough working capital to pay for your firm's growth and expansion plans. Some firms may need to put capital aside to fund retirements as well. Although pre-funding retirements is waning, some firms make payments to partners even after they retire.

Once you've determined your firm's general need for capital, hone in on the exact amount and how to raise it. There are several options in calculating the specific amount of working capital your firm should have on hand. One is to base the amount on monthly expenses. The number of months you should be prepared to cover depends on your firm's cash flow. Alternatively, working capital needs can be calculated as a fixed percentage of gross fee collections. The percentage you withhold depends on several variables, including the timeliness of billings collection, whether you plan to hire additional associates, and whether you plan to physically expand your office (which increases leasing expenses).

In general, law firms depend on partners for working capital. Most firms don't like to borrow money and would prefer to buildup working capital through internally generated profits. That translates into tapping partners' earnings. Law firms can ask partners to contribute a certain amount of capital initially, withhold some portion of each partner's earnings, allow partners to make their own capital contributions over time, or do some combination of all three.

Asking partners for capital can have ramifications. Lawyers do not have restrictive covenants, so if attorneys are not in total agreement with expansion plans or the amount that each is asked to contribute, they may go elsewhere. Some attorneys will have reservations about making capital contributions and claim, "I've had a great year and I want to get paid what I've earned." In addition, there are tax consequences to making capital contributions: Although partners forego the income they contribute to the working capital fund, they are generally still taxed on the income.

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Is Your Firm Properly Capitalized?

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Key Indicators That Can Shape a Capital Needs Plan

- Add together accounts receivable and work in progress. Then, divide by the amount of debt. The resulting number should be greater than five.
- Total debt should be less than 100 percent of the net book value of your firm's fixed assets.
- Your firm's balance on any line of credit should be zero at year end.
- Owner's equity of cash basis balance sheet should be positive and sufficiently liquid to cover at least two weeks of expenses.
- Your firm should not be in breach of any debt covenants.

Other Questions to Consider When Relying on Partners for Working Capital:

- What should be the initial capital contribution of an equity partner? Typical amounts range from zero to $75,000.
- Should your firm require additional capital contributions from partners, and if so, at what percentage? What will be the maximum amount? Typical ranges are from zero to ten percent, with a maximum of $300,000 in total.
- Should your firm ask an equal amount of capital from every partner? Should a junior partner contribute as much as a senior partner? The contribution amount is often based on compensation level.
- Will partners receive interest on the money they contribute? If so, what will be the interest rate? Typical amounts range from zero to ten percent.
- Will the firm pay back capital contributions? If so, how and when? Law firms typically pay partners back over a period of several years upon retirement.

In Conclusion

- Law firms should set aside enough working capital for the future.
- The amount and method depend on the firm's strategic plan.
- Firm should be cognizant of how capital contributions impact their partners.

There is no set formula or "packaged" solution to determining how much capital a firm needs or how to raise it. Every firm is different; each has its own unique and specific cash flow cycle and has different expansion goals. But all firms should start at the same place: by clearly defining a strategic plan. Only then can the firm make smart choices about how to finance its future.

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DOCUMENT MANAGEMENT IN THE MODERN AGE

BY ASHLEY BOMBARD

The legal industry affects almost everyone in one way or another, from hiring an attorney to represent you, to performing the closing on a recent home purchase, to dividing the assets in a divorce. With this widespread presence comes the need for a sophisticated form of record keeping. Law firms are currently rushing to convert their hard copy documents into digital files and to adapt to the latest technology trends. There are several areas of high document flow intensity in the legal litigation processes, both internal and between external entities. The areas of highest paper document flow intensity are from clients to law firms, and from law firms to opposing counsel and courts. There are very large amounts of paper documents received from clients that are scanned into databases for easier access, sorting, searching, and assessment. This is an area of opportunity for multifunctional devices (MFD) and software solutions to shine.

The legal industry has applied technology heavily to improve document flow efficiency in most areas of high volume intensity, so that there are no areas of alarmingly high inefficiency. There are several medium pain points of inefficient document flows, with document flow to courts—especially state and local—being the highest. The greatest areas of inefficiency are also perceived to have the highest barriers to efficiency improvements. For example, the barriers in state courts may be clerks who are stuck in paper-mode inertia.

While the application of technology is an overall plus, a key issue has arisen with the transition from paper documents to digital documents. Handling paper is a known entity, but the handling of digital documents—and all the implications—is not yet learned. The context of dealing with all documents is "broken," and current digital products are not yet dealing with the issues.

Some attorneys still like to work with paper, but the need to conduct searches requires digital databases. Some vendors are said to be moving toward dual media solutions. This is again an opportunity for various software solutions to assist legal firms in developing and migrating to a digital workflow.

Overall litigation in law firms is a very document-intensive environment. However, firms are at various stages in the conversion from hard copy documents to digital for the following reasons:

- Culture/precedent dictates paper usage.
- Need for manual mark-ups, submissions, signatures, etc.
- Many lawyers are not familiar with technology.
- Large/medium firms are typically ahead of the courts in using technology. Courts are primarily paper-based, but moving toward digital document use, especially in the federal, district, and bankruptcy courts.

In many cases, law firms' corporate and general clients are pushing for paperless processes as this reduces costs to them for copies, prints, distribution, and storage.

Leading companies in the print industry can provide guidance and implement a digital workflow with scanner devices. With these devices, firms can experience the ease of scanning hard copy documents and converting them into digital format. Teamed with an indexing system and enhanced solutions, law firms can enjoy the benefits of an advanced system that, takes digital documents and shows how they can be OCRed, indexed, edited, and marked up for review with in-house or opposing counsel. Additionally, law firms can take advantage of a digital workflow that can help them integrate into a court's PACER system, which is digital only.

One of the key challenges for law firms and other professional services companies is keeping track of expenses so that clients can be billed for them. In a paper-intensive environment like a law firm, these expenses can be significant—so, too, can the profits realized when clients are accurately billed for these services. When one New York City law firm that specializes in distressed debt transactions had only one multifunctional device and five single-function desktop printers, they found the answer to their issues with efficiency could be a dynamic print solution. To bill clients for printing, the office manager would retrieve print data manually, after which the information generated would

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Document Management in the Modern Age

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no longer be available. The process was time consuming and error-prone, which negatively impacted the accuracy of clients' bills. With a current count of more than 200 cost centers, the law firm expected that number to grow to more than 500, and so it was looking for a better way to track its output.

After carefully reviewing the law firm's requirements, it was a print solution that neatly solved the problems the firm was experiencing. An MFD with the Universal Send feature formed the backbone of the solution, as it satisfied all of the firm's functional requirements. But the key to successfully solving its challenges was an integrated print and scan management solution, configured to include the Remote Print Server, Statistics Module, and Client Login Manager. A carefully structured document workflow allowed users to print to the queue, then select the cost center for each print job before the prints were made, ensuring accurate billing for clients. Users were also prompted for cost center information when making copies, so every print made is charged back correctly. Best of all, the law firm's office manager can now run reports on demand, and the information is always accessible.

The law firm's clients demand accurate billing, and because the software is now monitoring the firm's output, its bills are once again accurate. Staff no longer needs to waste time manually retrieving reports from multiple devices, spend hours correcting mistakes, or research print jobs that are missing cost center information. Aside from class-leading quality and reliability, the print solution has proven to be the ideal fix for the firm's challenges.

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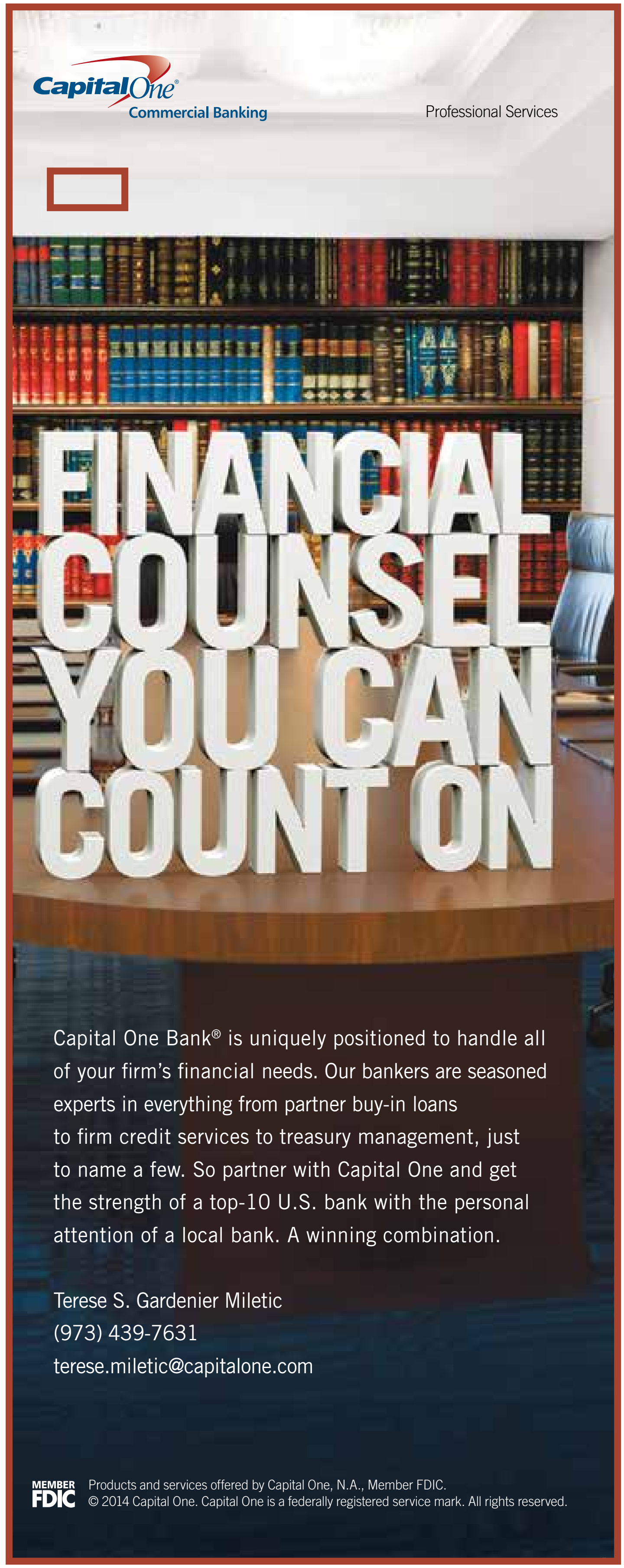

Feel Good, Work Well

By Rebecca Day

We hear a great deal about ergonomics today relating from small kitchen appliances and exercise equipment to our cars and work environments. Merriam Webster defines ergonomics as an applied science concerned with designing and arranging things people use so that the people and things interact most efficiently and safely. Buyer beware, not all products labeled "ergonomic" are actually good for you, as there are no laws in place and no governing bodies overseeing the utilization of the "ergonomic" label. With regard to both professional and personal environments, the truth regarding proper and healthy interactive behavior is that comfort and health are synonymous. In other words, if you are not comfortable sitting at your desk, for example, you are probably sitting and working in an unhealthy fashion.

Task related injuries and the associated costs to employers are staggering. Research shows that people with bad backs rack up 60% more in medical bills than their healthier colleagues and that the average worker experiencing muscle, tendon, ligament, or bone pain (not including backaches) loses 5½ hours a week in productivity. Says Brad Hutchins, an ergonomist in Thousand Oaks, California, "That can be just as costly as missing days in the office."

Obviously, these costs are very real. So, too, are the injuries, which can be extremely painful and debilitating. The good news, however, is that most work-related, repetitive stress injuries are avoidable.

Companies across all industries have seen the economic benefits of having ergonomic programs in place. Reports of success include fewer workers' compensation claims, decreased cost per claim, and increased productivity. For guidance, The National Institute for Safety and Health (NIOSH) has outlined a pathway for creating a successful ergonomics program, with details available at http://www.cdc.gov/niosh/docs/97-117/.

So what does one do to ensure good choices are made when purchasing products? As with so many areas of life, a good education is your best defense. With some attention to the principles outlined, employers can improve their employees' comfort and productivity, while at the same time reducing their risk of costly injuries. As stated by the American Industrial Hygiene Association, *"Ergonomic principles are most effectively applied to workstations and new designs on a preventive basis, before injuries or illnesses occur. Good design with ergonomics provides the greatest economic benefit for industry."*

Main Ergonomic Principles to Keep in Mind

Environment affects behavior. A well-designed workstation goes a long way toward ensuring that people work safely. "More consideration should be paid to the ergonomics of workstations, the placing of the mouse, the postures of the upper extremities and the handling of the mouse." (Occupational Medicine 2003).

Bear in mind, shrinking workspace per person as a result of recent economic conditions requires additional creativity to balance worker needs and corporate fiscal restraints.

Movement is critical. According to Marvin Dainoff, Director of the Center for Ergonomic Research at Miami University of Ohio, "Any fixed posture, no matter how closely it approaches the optimal, will generate muscle fatigue. Therefore, it is important to build in flexibility to allow operators to shift positions easily." A current trend in workplace environments are height adjustable tables and workstations. The best designed furniture is simple and fast to adjust. Manufacturers such as OFS and Humanscale have created tables and workstations that rise and lower with the touch of a button so that employees can quickly, easily, and drastically change their body position for maximum comfort and health.

Eleven Benching by OFS

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Feel Good, Work Well

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Float by Humanscale

SitOnIt's Torsa Task Chair

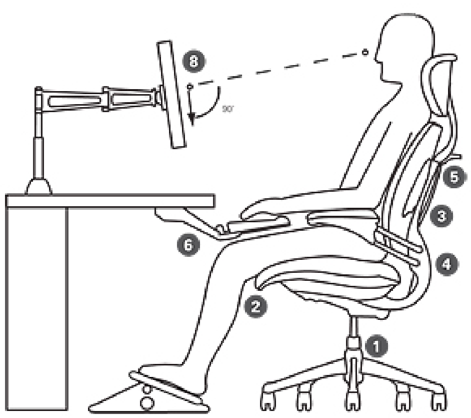
Minimize extreme postures. Neutral postures, meaning those that require minimal muscle activity to maintain, are synonymous with health and comfort. "Good posture" for the spine generally means maintaining the spine's natural curvature. Sitting bent forward or twisted to the side puts mechanical pressure on spinal discs, ligaments, and muscles. This type of strain over time can lead to damage of any of these structures and be the source of considerable pain.

Avoid contact stress. Focused pressures on specific parts of the body are extremely dangerous and can cause circulation problems at a minimum and nerve damage in more severe cases.

Take breaks. When performing repetitive tasks, it is extremely important to take breaks from those tasks on a regular basis. Such breaks could include actual work breaks, short exercise or stretch breaks, or simply switching gears and performing a different task for a few minutes.

4 Key Elements of a Healthy Work Environment

A working environment that positively influences behavior and therefore minimizes risk is made up of four key elements with which the user will interact on a daily basis: the chair; keyboard and mouse; monitor and documents; and lighting and glare. These elements are interactive, and must be considered together for a truly comprehensive approach to ergonomics.



The Chair (items 1-5 above). The most important piece of office equipment, from an ergonomics standpoint, is the chair. Task chairs should:

- Encourage movement
- Fit the user's body: seat height, seat depth, petite users should use a foot rest
- Recline is healthy
- Armrests should be adjustable and kept level

The Keyboard and Mouse (item 6 above). Carpal Tunnel Syndrome is a painful and debilitating disorder that can take months and even years to heal. However, it can be avoided in most cases with some basic preventative measures.

Position of the keyboard is more important than shape. To minimize risk for injury, place the keyboard on a platform below desk level. Another critical step is to angle the keyboard slightly away from the user in what is referred to as a "negative slope."

Movement is critical. A keyboard platform, such as one used to position the keyboard in a lowered, negative-tilt position, should also allow spontaneous changes to keyboard height and depth, so that the user can easily change positions as different tasks necessitate. Mousing within the Neutral Reach Zone minimizes shoulder abduction and wrist flexion/extension.

Monitor and Document Placement (item 8 above). While much discussion has surrounded the proper placement of the monitor, researchers overwhelmingly agree that the top line of text should be at or slightly below eye level.

Lighting and Glare Issues. Lighting is perhaps the most understated aspect of an ergonomic workstation and yet is arguably one of the most important with respect to human health and performance. Using a task light to supplement the ambient lighting scheme of the office can be an integral part of a comprehensive strategy to combat headaches, eyestrain, and neck and back pain. Task lighting solves the above lighting issues by offering a direct and adjustable source of light where it is needed most—on the task at hand. Furthermore, task lighting has been shown to have the added benefit of increasing worker productivity.

Ergonomics are an integral factor in the design of today's workplace. As there are no laws in place and no governing bodies overseeing the utilization of the "ergonomic" label, buyers must exercise care in the purchase and design of workplace equipment. The truth regarding proper workplace design is that comfort and health are tantamount, and that proper ergonomics are necessary to ensure a productive, healthy workplace.

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Making the Case: What Law Firms Should Know About Logistics

Surprising Tips to Streamline Operations and Grow Your Firm

By Will Robertson

Overall, the economic downturn has had a major impact on law firms. Although the industry is still facing tough times ahead, there are ways to stay ahead of the competition and achieve growth. Managing partners can turn today's challenges into opportunities by addressing an unexpected and often overlooked area of their operations—logistics.

Of all the cost centers that law firm administrators have to monitor and manage, the one that is typically overlooked is the mailroom and shipping. In *The Facility Management Handbook*, one cited study reported that mail accounts for more than 9 percent of total operating costs for Fortune 500 companies. In midsized law firms, that number is, in all likelihood, significantly higher because they usually lack the resources to buy the latest technology or stay abreast of changing regulations and opportunities.

Whether firms realize it or not, logistics can have a significant impact on their cost management, growth, and reputation goals. Below are some surprising areas where logistics can have a positive impact on law firms:

Process Efficiencies

Creating more efficient practices and more productive employees allows partners to focus on the core of their business—exceeding the expectations of existing clients and bringing in new ones. When looking at practices and processes that are part of a firm's day-to-day operations, logistics plays a significant role.

With the amount of deliveries being processed daily at the average law firm, inefficient shipping practices can take up massive amounts of a firm staff's time. There are shipping technologies on the market today that allow attorneys and staff to automate processes, validate client and matter codes upstream in the shipping process, reduce costly errors and inefficiencies — ultimately freeing up time and money that can be used to better serve clients and grow business.

As for the potential impact, some law firms have experienced estimated savings of eight hours in package tracking time and 40 hours in cost allocation time per week, just from adopting electronic shipping and visibility tools. Firms should request an assessment of their current shipping and visibility technologies to identify areas for improvement and savings. Some carriers even offer onsite training for staff on new technologies that can improve their operational efficiency.

Branding & Marketing

With much competition in the marketplace, it's only natural that marketing has become a top priority for many law firms. Although many firms may not realize it, their shipping carrier can play a role in their marketing strategy. John Remsen, Jr., widely recognized as one of the country's leading authorities on law firm leadership, management, marketing, and business development, discusses the importance of firm branding here.

For example, there are options such as customizable branded envelopes and labels that help increase the visibility of a firm's brand and set its shipments apart from others. Something as simple as changing the envelopes that a firm's documents and materials are delivered in can go a long way in building brand equity and make a powerful impression on clients. Customizable reusable envelopes also give clients a convenient and green way to return documents back to the firm.

Risk Mitigation

The third area that logistics can impact is risk mitigation. Minimizing risk is an increasing concern of law firms. Some shippers offer insurance services that provide protection against consequential damages for time-sensitive documents shipped. Standard declared value does not cover items like contracts and agreements, so this option provides firms with extra protection and peace of mind when shipping client contracts and discovery documentation that is crucial to a case.

Shipment visibility technologies that were mentioned earlier also help mitigate risk by giving firms visibility into the status of critical shipments and letting them make changes to deliveries when needed to ensure that documents land in the right hands.

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Making the Case
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Client Service

Last, but certainly not least, logistics can have a large impact on client service. In addition to ensuring that documents arrive fast and on time, more sophisticated logistics processes allow firms to be proactive in alerting clients about the status of shipments versus waiting to react to client questions. For example, shipping technologies with automated alerts let firms know when there will be a delivery exception due to weather or security, giving them the opportunity to tell their clients in advance and manage expectations.

Overall, evidence is everywhere that logistics plays a large role in a law firm's operations. Making a case for logistics improvements shouldn't prompt objections among partners or administrative staff, all of whom stand to benefit from even small changes. Finding new ways to stand out in today's marketplace can pay off in terms of client loyalty, reputation and the bottom line.

At the end of the day, there are several solutions that can help firms better manage their shipping/mailroom expenditures, but working with a shipping/mail systems expert may help to figure out the best way to prevent firms from shipping profits out the door.

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NEW MEMBER SPOTLIGHT

INTRODUCING OUR NEWEST MEMBERS OF NJALA

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What's New In Generational Awareness

By Elyssa Goldstein

Within the last ten years, the culture of our law firms has been met with the challenge of catering to the diverse needs of four distinct generations. As the age of retirement continues to increase due, in large part, to the current period of economic instability in our country, most, if not all, law firms find themselves with employees categorized as members of the Silent Generation or Traditionalists (born between 1927 and 1945), the Baby Boomers (born between 1946 and 1964), Generation X or the Busters (born between 1965 and 1983) and Generation Y or the Millennials (born between 1984 and 2002).

The aforementioned challenge stems from one simple governing principle: the predominant values and work ethic of one generation are largely nontransferable to the next generation, creating a "lack of relatability" between employees that, at times, can hinder workplace productivity and create unnecessary tension.

"Young employees of Generation Y have a lot to offer to their predecessors. Technological savvy, outside-the-box thinking and a team-building mentality are transforming the law firm of today and laying the groundwork for the law firm of tomorrow.. "

While many articles have and will continue to be written on how best to dissipate said tension and establish harmony and understanding between the generations, I feel it is my duty as a member of the "entitled" Gen Y to paint a picture of the workplace trends and lifestyle important to my fellow Millennials and me.

Generation Y has a reputation for believing in instant gratification and depending more on its peers than on its preceding generations for guidance, support, and development of an overall moral code. We tend to switch jobs (and even careers) at a rapid pace and are constantly seeking positive feedback, rewards, or incentives for our work product.

Witnessing the birth and boom of social media, Millennials tend to communicate quickly, but may not always do so effectively. The text message, tweet, and status update often prevail over the handwritten correspondence and grammatically correct sentence.

In 2011, Cisco released its second annual "Connected World Technology Report," which focused on a survey of 100 college students and 100 young employees under the age of 30 in each of 14 countries (United States, Canada, Mexico, Brazil, United Kingdom, France, Spain, Germany, Italy, Russia, India, China, Japan, and Australia). The survey was commissioned to assess present-day challenges companies face as they strive to balance employee and business needs and provides some fascinating insight into what matters most to the newest generation of workers.

Gen Y'ers polled by InsightExpress, the third-party market research firm hired by Cisco to conduct its survey, stressed the influence of social media and mobile device policies and remote access and flexible work hours as top factors (in addition to salary) used to evaluate and select a job. In fact, one in three college students, and young professionals in their 20s prioritized social media freedom (including the ability to choose one's mobile device) and work mobility *over* salary.

Forty percent (40%) of college students and 45% of young employees indicated their willingness to accept a lower-paying job with more flexibility with regard to social media access, device choice, and work mobility than a higher-paying job with less flexibility in those areas. Additionally, 56% of college students expressed that they would not accept a job which banned social media access and nearly one-third of young employees globally believe their comfort level with technological devices and social media helped them get hired.

Cisco's study also found that Millennials crave a flexible work schedule and, unlike past generations, do not believe it is necessary to work in a traditional office environment full-time. A whopping 69% of young employees and 70% of college students polled feel that regular office attendance is no longer a necessity.

The members of Generation Y are comfortable with working from remote locations and 43% of young employees

(Continued on page 17)

What's New In Generational Awareness

(Continued from page 16)

deem remote access critical to their job performance and productivity. They believe that the next generation, referred to as Generation Z or the Digital Generation (individuals born after 2003), will find remote access on airplanes, televisions, and GPS systems to be commonplace.

I decided to gather the opinions of my peers, Millennials with whom I work in the legal field, in conjunction with my research for this article. In addition to agreeing with the trends detailed above, two other sentiments were expressed by the majority of those with whom I spoke.

First, a family-centric attitude and a non-negotiable work-life balance weighs heavily on the minds of the participants in my poll. A number of individuals openly admitted that they did not seek a "fast track" lifestyle and were instead perfectly content to forego a promotion if it meant the opportunity to spend more time with their families and friends.

Second, a work environment which fosters teamwork and collaboration is highly appreciated by Gen Y'ers. Eighty percent of the young employees I consulted were comforted by the fact that they worked with a sizable team of administrative personnel or had fellow associates to show them the ropes. Peer mentoring and a sense of trust among Millennials were ranked as invaluable workplace attributes.

In summation, the young employees of Generation Y have a lot to offer to their predecessors. Technological savvy, outside-the-box thinking and a team-building mentality are transforming the law firm of today and laying the groundwork for the law firm of tomorrow. If members of other generations can recognize the importance of Millennials in the workplace before their days in the workplace are through, our future will be brighter than it's ever been.

Elyssa Goldstein is the Office Manager of the Wayne, New Jersey and New York, New York offices of Gonzalez Saggio & Harlan LLP.

CELEBRATING THE HOLIDAYS WITH NJALA

BY MICHELLE COHEN

Our Monthly NJALA meetings always begin the same way—we meet and greet friends, new members, speakers, and business partners who are in attendance, while having something to eat prior to a program of interest starting. What was so great about this Holiday Party (my first I was able to attend since joining the NJALA) was that the whole evening was about US, the members of our organization, and celebrating the "holiday season" together. We were the only order of business. We met on December 3rd, 2013 at Canoe Brook Country Club in Summit. This was a wonderfully decorated facility with lights, greenery, and Christmas trees no matter what room you were walking through! It was truly beautiful, elegant and festive! Upon arrival you couldn't help but smile ☺.

As soon as I entered I was first handed a little red ticket stub (more on that later) and then I saw we had a magician strolling around. I must say that the magical styling of Will Fern was truly unbelievable! During the cocktail hour I had the pleasure of watching him guess someone's first crush (the exact first name which he guessed spot on), among other tricks that were beyond "slight of hand." I was mesmerized! This entertainment continued into dinner, as he made the rounds to the tables that were waiting to go up for the buffet (I will get to that in a minute!). At my table, he did various magic tricks but absolutely stunned the table when we found a Business Partner's $20 bill with his own initials "sealed" inside a lime that he cut open in front of all of us! Wow! Great entertainment!

A dinner buffet was served with more food than any of us could realistically eat, including salad, chicken, beef, salmon, and every possible side dish imaginable—YUM! Dessert, always a highlight at any meeting, was certainly no disappointment to those that had room left to partake! A beautiful dessert table was offered filled with every possible sweet out there to tempt you. The food was great, the company was fabulous, and the venue was outstanding.

As NJALA always does, we collected a tidy sum for Wynona's House in Newark, this year's NJALA charity in our 50/50 raffle, and were so pleased to have ended up with a sizeable donation, especially after our winner "gave back" half of her winnings! NJALA matched the donation so we were extra pleased to be able to give this money to our charity of choice. Additionally, we collected gift cards during this evening to benefit YCS children, also located in Newark. Thank you to all who contributed a gift card for this wonderful cause. As if that wasn't exciting enough, throughout our meal those little red tickets were being called—it seemed over half the room won something—all generous items donated by our business partners that were present. There was everything from exotic (GIANT!) baskets of Godiva chocolates to iPad minis, Visa gift certificates, and store gift certificates and everything in between. Also, three scholarships were given out for the Annual ALA Conference & Exposition coming up May 19-22, 2014, in Toronto. You just had to attend the event to get your name in the jar for a scholarship, another great reason to be there.

As I mentioned, some of our NJALA Business Partners were in attendance. We truly need to thank our Business Partners for their generosity in being so kind as to donate these incredible gifts to our organization. I had the pleasure at being at a table with only two other NJALA members—the rest were Business Partners. Since I am a "newbie" to NJALA I can honestly say it was hard to distinguish members from our Business Partners because everyone is so professional, fun, and interesting. It was a pleasure to meet and dine with everyone at my table. Experiences like this make me even that much more willing to take that call and hear what they have to say when our business partners reach out to us because they are wonderful resources for us. So please, take their calls and thank them for their involvement in NJALA (even if you do not need their services). Also, they are really fun to hang out with (at least as far as my table was concerned!!).

While I am unable to compare this event to any prior events I thought this evening was a tremendous success and a special thank you needs to go out to all the people who clearly worked so hard to put the evening together, especially our hosts, Judy Sotardi and Audrey Serban.

For those of you who were unable to attend, I am sorry you missed this evening and hope you can make it next year. I hope all of you had a happy and healthy Holiday season and New Year.

__Michelle Cohen is the Director of Human Resources & Office Manager at Schneck Law Group, LLC in Livingston.__



























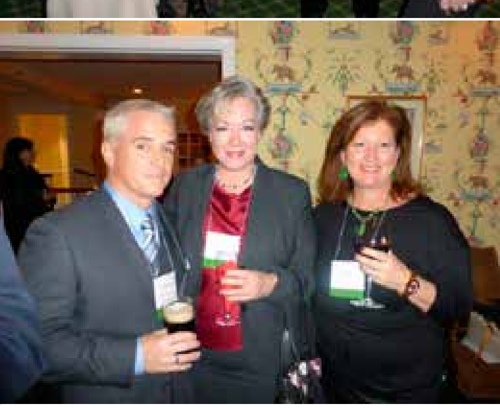


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UPS surveyed 450+ attendees at the 2013 Association of Legal Administrators (ALA) National Conference to uncover the most pressing business and operational challenges and key focus areas of law firms in the future.

ups.com/lawfirms

TECHNOLOGY & EFFICIENCY

The greatest day-to-day challenges

56% Time management

46% Managing costs & expenses

30% Office inefficiencies & technology issues

49% Nearly half of ALA members surveyed reported that their firms plan to invest in technologies in the next year to increase competitiveness and grow their business

CLIENT SERVICE

Key focus areas for law firms in 2013

49% Client service

47% Business development

41% Cost management

87% of respondents identified client service as their top priority

MARKETING & BRANDING

Reported marketing and branding as a key focus in 2013 31%

46% Will invest in marketing and branding in 2014

YOUR BRAND HERE
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More than half of respondents report that printing a firm's logo or branding on an express shipping envelope is beneficial +50%

DIGITAL VS. PAPER

Following general correspondence items, invoices and court briefings are the most common documents moving to digital formats

INVOICE

Invoices

Court briefings

Overnight shipping is essential for contracts and client proposals, which are the documents least likely to move to digital formats

Client proposals & contracts

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What's on Tap

ALA and NJALA 2014 CALENDAR OF EVENTS

Free ALA Webinar Series — Affordable Care Act and Your Law Firm

Visit www.alanet.org for more information.

Part 1: What You Need to Know Now
Available On Demand

Part 2: Getting a Jump Start 2014 and 2015
Available On Demand

Part 3: Affordable Care Act and Your Law Firm: The Healthcare Evolution
Available On Demand

Saturday, March 29, 2014 (1:00-3:30 pm)

NJALA Charity **Bowl-A-Thon** at Eagle Rock Lanes, 424 Eagle Rock Avenue, West Orange. Join NJALA members, business partners and friends for a fun afternoon and contribute to the community too. All proceeds go to the Interfaith Food Pantry, serving Morris County. Contact Mitch Rait at mrait@buddlarner.com for more information.

May 13, 2014 (6:00-9:00 pm)

Managing Partner Night at The Manor in West Orange. Managing Diversity of Personality and Style in the Workplace, by Andres Tapia. A buffet dinner will be served.

Wednesday, March 19, 2014

ALA Monthly Webinar. Persuasive Writing Skills. Contact Peggy Siems, ALA Headquarters for more information.

May 19-22, 2014

ALA National Conference in Toronto, Canada. Join your friends at this year's National Conference, which will be packed with information, educational sessions, workshops, guest speakers, and plenty of networking time with business partners and peers.

The 2014 Annual Conference Committee has announced that former U.S. Rep. **Gabrielle** "Gabby" **Giffords** and her husband, **Captain Mark Kelly,** a retired combat pilot and astronaut, are confirmed to appear as the opening keynote speakers for the conference. See www.alanet.org for details.

Tuesday, April 8, 2014 (6:00-9:00 pm)

Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: To Be Decided. A buffet dinner will be served.

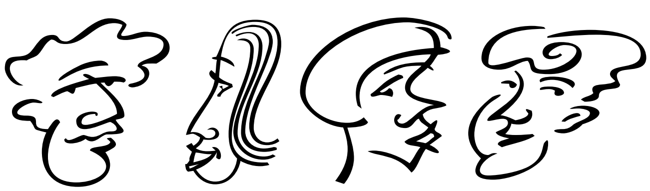
For information about:

Monthly meetings – Please contact Audrey Serban of Fisher & Phillips at 908-516-1061.

Educational Workshops – Please contact Nancy Harris, of Gordon Rees at 973-549-2500.

NJALA Socials – Please contact Judy Sotardi of Forman Holt Eliades & Youngman, LLC at 201-845-1000, ext. 376.

ALA Webinars: Registration and general information is posted on the ALA site, www.alanet.org/education/regconf/telesem.html.



Up to The Minute …

Summary of Minutes of the NJALA Executive Board Meetings Held Through January, 2014

By Doreen Marino, PHR

Board Members are Mary Ellen Dolan, President; Audrey Serban, Vice President, Programs; Robbin Dolan, Vice President, Membership; Michael Harrison, Treasurer; Doreen Marino, Secretary; Gayle Englert, Immediate Past President; Fran Puntillo, Trustee; Kurt Brown, Trustee; Mary Beth Donoghue, Trustee; Mitchell Rait, Trustee; Jim Van Leir, Trustee; Kurt Brown, Trustee; Nancy Harris, Alternate Trustee; Teri Siegle, Alternate Trustee; Louise Ruffo, Alternate Trustee; and Jim Wostbrock, Alternate Trustee.

President's Report

The Board has been focusing on the changes and adjustments needed throughout all the programs and events to comply with the chapter's new fiscal year. The current Board and membership expires as of March 31, 2014 and plans are in place to kick off the new year on April 1, 2014.

Minutes of the Last Meeting

The Minutes from the November 12, 2013 Board of Trustees Meeting was unanimously accepted by the Board.

Membership Reports/Renewals

Robbin Dolan reported that we have one new member, Tracy Armstrong, Esq., and one returning member, Marianne Stamm. Both members have signed up to attend tonight's educational session.

The membership renewals will need to go out by February 1st in order to get the membership underway by April 1st.

Programs Report

Audrey Serban reported that she has confirmed the following schedule:

- 1-14-14 Russell Shinksy *Law Firm Structure, Firm Capital & 2013 Income Taxes*.
- 2-11-14 Judy Hissong, Nesso Stategies, *The Power of the Mind*.
  This meeting will start 15 minutes earlier since the Board nominations will be announced
- 3-11-14 Tim Horrigan (topic to be announced, likely related to cloud computing).
  This meeting will start 15 minutes earlier since the incoming Board installation will take place
- 4-8-14 Open
- 5-13-14 Andres Tapia, Managing Diversity of Personality and Style in the Workplace.
  The Board of Trustees will be introduced at this meeting.

A lengthy discussion among the Board over recording the educational sessions ensued. Audrey will check with some of our Business Partners to see if anyone can record the meetings. The goal would be to have the meetings posted on the website for members that cannot attend the sessions.

Workshop Report

Workshop plans are the following:

1. ILTA Trust Accounts – possibly with Rob Gellman of TAME.
2. A re-run of the Social Security Workshop to be held in the Morristown area.
3. A possible CLM review.

Mary Ellen Dolan requested that Nancy make efforts to tap into the business partners as potential presenters for the workshops.

ALA IDEA Awards

The Board is still struggling with this concept and agreed that we do not yet have a clear understanding of what qualifies. It was decided that we may get a better understanding at the National Conference.

LOM/NJSBA

Gayle Englert reported that the LOMC is planning the following programs for the NJSBA Annual Meeting:

- The Future of the Law Firm
- The Art of Persuasion
- Ethics & Business Development
- Trust Accounting

Community Challenge

Jim Van Leir and Mitch Rait discussed a bowl-a-thon toward the end of March. They would see what lanes were available and report back to the Board.

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Up to the Minute

(Continued from page 29)

Business Partner Relations

Mary Ellen Dolan was pleased to report that we are still getting sponsors. She also noted that since the fiscal year was approaching an end, all the sponsorships needed to be renewed. She pointed out to the Board that because of the proration of the cost sponsorship, there were a lot more sponsors that took advantage of the discount. We may not have as many sponsors for the coming year.

The Legal Vendors Network is hosting an event on January 23. Mary Ellen, Kurt Brown and Gayle Englert will be attending this function.

Equipment Survey

MaryBeth Donoghue reported that this will be going out shortly.

Newsletter Report/Newsletter Advertising

Robbin Dolan confirmed that the last volume of the year, Volume 4, has been published both in hard copy and electronic copy. This is the last hard copy being published. We are underway working on the first issue of 2014. Members of the Board made some suggestions on fine tuning the electronic copy such as not having the business partner links open on the same page and possibly adding links at the end of business partner articles.

Website

Robbin Dolan and Teri Siegle discussed edits to the membership information and the type of reporting the website is capable of. This could/should be enhanced. Teri reported that e-mail circulation for the Committees have been added to the site. The Business Partner banner has been updated. Teri also reported that Joanne O'Bierne has been diligent in sending over pictures for the website.

Teri questioned whether or not we should be considering adding ability for members to pay for membership on the site. The Board discussed a merchant account and/or a Pay Pal account, but felt that for now, we will require check payments for new memberships.

Socials and Other Events

Mary Ellen Dolan and Audrey Serban discussed the social schedule to focus on the new fiscal year.

Other social events that need to be planned:

1. Board Dinner – Mary Ellen President's Dinner
2. Business Partner Appreciation Dinner
3. June Social
4. Golf Outing

Doreen Marino is the Human Resources Director of Lerner David Littenberg Krumholz & Mentlik, LLP in Westfield

Member Profile: Elyssa Goldstein

By Fran Puntillo, CLM

I've been very fortunate to have attended ALA's Annual Conferences over the past ten or so years. At each conference, I've found at least one program that deals with "generational differences," a favorite topic of mine. I go to those seminars every year. I love to hear speakers describe the pros and cons of the various quirks of Boomers and Gen X-ers and Gen Y-ers, and how legal administrators should work hard to add and blend diverse age groups into the workplace. The "good" speakers have even managed to help me understand why my mother drove me crazy and why my granddaughter thinks I'm nuts.

Last year, the generational differences seminar I attended addressed the importance of transitioning the "elder statesman" out of the leadership circles with care and planning. The speaker was quick to point out that a vacancy created by retirement or other event would create a vacuum within the organization which needed to be filled (yes, I paid money to hear someone say that). That seminar should have been entitled "Successful Succession Planning" because that's really what it was about.

As a Board member of NJALA, I have had the privilege of working with Boomer, Gen X-er and Gen Y-er officers and trustees over the years. I've worked with some unimaginably creative and effective presidents and board members and some who were thankful just to get through their year in office without any major mishaps! I've also served on nomination committees for ALA, NJALA, and other organizations. Sometimes that duty was performed in a crisis mode and at other times it was just a matter of passing the gavel from one person to the next. If I knew then, what I know now after taking the ALA seminar on succession planning, I think I would have tried to be less short-sighted. Instead of stressing over how to fill a vacuum, I would focus more on planning for a long-range and successful transition of the organization's leadership by deliberately selecting a healthy mix of people from different generations.

So, I'm very pleased to introduce you to Elyssa Goldstein, one of our new and "younger" members. Elyssa is the Office Manager at the firm of Gonzalez Saggio Harlan in Wayne. She was born in Livingston, NJ, left to earn her bachelor's degree at Hofstra University on Long Island and then returned home to our fair state. She originally thought she'd make her career in music or teaching. However, fate played a hand after her graduation from college when she took a "temporary" job at the law firm where her Mom worked. Elyssa began her employment there as a receptionist. I'm sure her outgoing personality was an asset to the firm's front desk! However, shortly thereafter, her potential was recognized and she was promoted to a billing assistant for the New York/New Jersey offices of her firm. She continued up the ladder to become the Billing Coordinator for all of her firm's branch offices in the Northeast. In 2013, she became the Office Manager of the Wayne location. As office manager, she handles human resources, facilities, conflicts, and file maintenance in Wayne as well as continuing to coordinate the regional billing. Before retiring and moving to Florida, her Mom, a former NJALA Chapter member, told her daughter that joining ALA and NJALA was essential for her professional growth, and Elyssa followed her Mom's advice. Elyssa is even tossing around the idea of pursuing her CLM certification in the near future.

Elyssa is a busy lady who still makes time in her schedule for family and friends. During the interview, we talked about the many female role models she has. Time has taken some of the special women from Elyssa, but the others she keeps close to her heart by making a point to stay in touch with them throughout the year. Ask her about the special women in her life… she has lots of funny anecdotes about them that will surely entertain you.

So how does she tie in to my introductory comments? Let me tell you! Elyssa was a pleasure to speak with during our interview. In her I see the dreams and ambition of "youth"; she has drive and confidence; she is eager and willing to learn. Although she says she's more apt to sit back and observe, at least initially, once Elyssa feels comfortable with a group or individual she willingly invests herself wholeheartedly in the relationship. She has quickly become a valued member of the NJALA Newsletter Committee, volunteering for any task that needs to be done. She's like a sponge, picking up skills by observing others, and as such, Elyssa is very happy to be a part of NJALA, soaking up tidbits every chance she gets during our chapter's networking opportunities.

(Continued on page 32)

Elyssa Goldstein
(Continued from page 31)

And NJALA should be thrilled to have her. As one of our chapter's "younger" members, Elyssa is wide open to change; she energizes the people around her with her fresh enthusiasm; she's device-hungry and tech savvy; and has bolder expectations than some of us more seasoned (read "older") members. She's eager to earn the respect of the NJALA members and hopes at some point to be recognized as a potential teacher for our group as well as an eager pupil. I sense in her a thirst for learning and self-discovery.

As I may have said before, being a member of the Newsletter Committee has given me the opportunity to get up close and personal with some amazing new (read "younger") members of NJALA. The members I've introduced you to over the past few issues of the Jer-Z-Journal bring something with them that is priceless. Elyssa is a gift that has been given to NJALA. Let's unwrap our present and make good use of her!

I must confess that after conducting these recent newsletter interviews, I have confidence in the younger members, like Elyssa, who will come along to fill the void time creates in our chapter and on our board. As the NJALA gavel is passed along over the next several years, I have the utmost faith that if it is given to and held by members like Elyssa, they will inspire change through their generational differences and guide NJALA towards very bright future.

Fran Puntillo, CLM, is the Office Manager of Weiner Lesniak, LLP in Parsippany

Don't Miss

NJALA Bowl-A-Thon

Saturday, March 29, 2014
1:00-3:30 pm

Eagle Rock Lanes
424 Eagle Rock Avenue
West Orange

Contact: Mitch Rait
at mrait@buddlarner.com
for more information.

A Quarter Past

October 2013

A monthly meeting and education session was held on October 8, 2013 at the Highlawn Pavilion in West Orange. The session was presented by Mark Shore, President of Atlas Consulting Services, LLC. The session was titled ***Health Care Reform: How Prepared Are You?***

October 2013 Monthly Meeting

November 2013

Our Community Challenge was held on November 2, 2013. We partnered with Morris County Habitat for Humanity, working at Family Promise of Morris County, NJ. Family Promise of Morris County is a non-sectarian, not-for-profit organization dedicated to ending the crisis of homelessness faced by Morris County families, by partnering with other public and private agencies, religious congregations, and community volunteers, to provide shelter, case management, and mentoring services leading to self-sufficiency.

Community Challenge

A workshop was held on Wednesday, November 6, 2013, at Lindabury, McCormick, Estabrook & Cooper, P.C., in Westfield. Amanda Lott, CFP®, CRC®, and John Zeltmann, CFP®, CRA, financial advisors from Regent Atlantic, presented ***Not Your Grandma's Social Security Strategies—A Fresh Look at Maximizing Your Benefits!*** The workshop addressed common Social Security questions, such as: How secure is the Social Security trust fund? How much may your benefit be? When should you apply for benefits? Do you want to leave money on the table? What mistakes should you avoid? And finally: How does your spouse factor in?

November Workshop

Michael, S. Cohen, Esq., Partner of Duane Morris, LLP, Philadelphia, PA presented "***Performance Management – Yes, Law Firms Have to Do It Too"*** at the November 12th monthly meeting and education session at the Highlawn Pavilion in West Orange.

November Monthly Meeting

December 2013

The December Social was held at the Canoe Brook Country Club in Summit. Proceeds from the 50/50 raffle went to Wynona's House and the children of YCS received all the Target and Walmart gift cards. A magician entertained everyone during the cocktail hour and dinner. Overall a very relaxing night at a very hectic time of the year.

Presenting… Our Business Partners

By Mary Ellen Dolan and Louise Ruffo

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Kenneth E. Winslow, CPA, PSA
Partner
kewinslow@bederson.com
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For more information about Bederson and our services, please contact Kenneth Winslow directly at 973-530-9115 or Kewinslow@bederson.com.

(Continued on page 37)

Presenting our Business Partners

(Continued from page 36)

Will Robertson, Professional Services
Marketing Manager
wrobertson@ups.com
603-703-1516

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When your business measures life by billable hours, you've got to make every minute count. Logistics streamlines shipping processes, helping you shed inefficiencies and save valuable time and money.

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Using UPS shipping and technology solutions, law firms have been able to improve shipping cost recovery as well as shipment preparation time. One law firm experienced an estimated weekly savings of eight hours for package tracking and 40 hours for cost allocation. That's time that staff can now devote to the business at hand.

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Established in 1898, Jamison is a full-service insurance brokerage, retirement planning, and employee benefits consulting firm with a rich history, stellar reputation, and deep roots in the Tri-State area.

One of our primary areas of expertise is the negotiation and placement of Professional Liability Insurance for Law Firms. In our capacity as professional liability insurance specialists, we provide our clients with the following services and benefits:

- Thorough understanding of each firm's practice profile and insurance requirements;
- Established and strong relationships with leading professional liability insurers;
- Access to the Global market via our London liaison, Grosvenor Brokers;
- Ability to present our clients with viable insurance options that best address their specific needs;
- Detailed proposals that include stewardship reports, market summaries, executive summaries, coverage exhibits, and sample policy forms and endorsements;
- Coordination of Risk Management Programs that are tailored to address each client's practice profile and risk mitigation requirements (in some instances, participating attorneys will receive continuing education credits);
- Exceptional customer service that is provided throughout the policy year;
- Dedicated Account Executives who strive to establish long term relationships with each firm;
- Capability and commitment to serve as claims advocates and liaisons for our clients;
- Presence in the Tri-State area, which enables us to understand the insurance needs of law firms who are practicing in this unique and cosmopolitan environment; and
- We are a member of Assured Partners, Inc., one of the largest and fastest growing insurance brokerage firms in the United States.

We also provide a full range of employee benefits consulting and retirement planning services. For information on Employee Benefits Consulting, Retirement Planning, and other insurance services, please visit our website: www.jamisongroup.com.

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Presenting our Business Partners

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LOEB Consulting Group, LLC

Developing People, Developing Leaders

Exemplary Leaders in Law Firms? You Bet!
Natalie Loeb, Loeb Consulting Group, LLC

Creating an environment that fully engages today's multi-generational, ambitious, and highly intelligent workforce is a challenge. Nowhere is that more true than in the nation's law firms and corporate legal suites. Bonuses and prestige are no longer enough to build commitment. Instead, new associates, and staff are looking to develop new skills and expertise, to be mentored and given opportunities to learn, and to contribute in meaningful ways.

Exemplary leaders—whether partners, administrators or others in the practice of law—know that everyone, regardless of rank or title, deserves to be treated with respect and that a work environment built upon trust and collaboration is essential. They understand human relations and make a difference in the lives of colleagues and clients by facilitating clear communication and confronting conflict with respect and dignity. They pay attention to their own behaviors and the impact they have on others. And they lead by example, inspiring and influencing others, and creating an innovative and respectful environment that garners genuine engagement and commitment from staff and positive bottom-line results.

The Leadership Challenge® (TLC) is an evidence-based leadership development model that is backed by over 30 years of rigorous research by Jim Kouzes and Barry Posner. In our experience, collaborative cultures, good morale, increased productivity, and profits are present in those firms where both the lawyers and administrators demonstrate TLC's 5 practices of exemplary leaders.

Loeb Consulting Group is a leadership and management development company and we are proud to bring The Leadership Challenge® to our law firm clients. To learn how to become an exemplary leader, contact Jill Schellenberger at jschellenberger@loebconsultinggroup.com or visit www.loebconsultinggroup.com.

Canon

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Canon Solutions America is a valued partner to many lawyers and legal providers across the United States. Our multifunctional devices and solutions have been the top choice of law firms for five straight years, according to ILTA. Buyers Laboratory LLC awarded Canon, Inc. the 2013 Document Imaging Solutions Line of the Year award.

Canon Solutions America's seamless integration of multifunctional devices, software, and services streamlines document workflow, redefining the way information is accessed, shared, and managed. As a result, productivity goes up, efficiency tightens, data security improves and costs fall.

Our approach to finding the right solution is to learn about your unique environment and challenges, partner with you in planning a customized solution, then follow up with world-class service. Here are just a few ways we can help streamline your business:

We address data security vulnerabilities, protecting client confidentiality and securing access controls.

The Canon Cloud Portal for imageRUNNER ADVANCE software enables users to scan and store legal paper documents to cloud services from an imageRUNNER ADVANCE device.

Canon Solutions America's mobile solutions, including uniFLOW v5.1, Canon Direct Print and Scan for Mobile and EFI's Print Me Service, can transform multi-step manual discovery processes—such as sending documents to an attorney for opposing counsel—into custom, one-touch buttons.

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Presenting our Business Partners

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ALL-STATE LEGAL

Anne Itri-Regional Sales Manager, ALL-STATE LEGAL
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vizCard™ Mobile Business Cards – Redefining Traditional Business Cards to Keep Up With Today's Technology

As the nation's premier engraver and printer for professional services firms, we see business cards as the first form of mobile marketing. **ALL-STATE LEGAL is redefining the traditional business card to keep up with today's technology.** Unite your offline and online identity with traditional business cards and vizCard mobile business—a perfect marriage of print and pixels that offers you a dynamic way to connect and engage with the people you meet and enhance your business development efforts.

Your professionals' traditional business cards can be used to deliver their vizCards—personal mobile websites packed with information about the firm and the professionals (including

contact information, bio, online content, hand-picked Google results, and social networking connections). vizCards also make it easy for professionals to share vcards, which can be downloaded on any smartphone, tablet, or computer.

The combination of ALL-STATE LEGAL's online print platform with Vizibility's online vizCard manager enables you to harness the power of print, QR codes, mobile technology, search, and social media for your firm and your professionals. With this dynamic couple, making a lasting impression just got a whole lot easier.

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Q&A: TODAY

By Elli Albert

Q: Our law firms all try to do things to keep our employees engaged. What does your firm do for its employees that you think makes your firm a great place to work?

Michelle Cohen of Schneck Law Group LLC: Our office does lots of little things to make our workplace a great place to be! Every Friday is jeans casual day (and also anytime it snows), unless you are an attorney and have to be in court, of course! We order in Chinese food (anything we want) every single Wednesday. The fridge and pantry are stocked with sodas, seltzers, bottled water, Keurig coffees and teas. If your child is sick, you can bring them to work with you—could you possibly get a better, more parent-friendly environment? Every person gets a cake and a card signed by everyone on or as close as possible to their actual birthday. Also, they get whatever they want to celebrate their big day (cake, yogurt, fruit, etc.).

Joanne O'Beirne of Wolkstein, Von Ellen & Brown, LLC: Our firm has bagel Tuesdays, we have dress down Fridays, and the firm provides lunch for all of us every Friday! They also give us a gift on our birthday as well as for the holidays, along with a holiday bonus.

Carol Gabriele of Morgan Melhuish Abrutyn: We have bagels every day. We close early (or half day) on the day before a holiday. We are flexible about staff making up time. We allow carryover of vacation days and/or payout at the end of year for days not taken. Our dress code is relaxed to permit jeans from 12/23 to 12/31.

Audrey Serban of Fisher & Phillips LLP: Our employees are provided a free pizza lunch every other Thursday. It's fun to have everyone in the lunch room at the same time enjoying pizza and the camaraderie of their fellow employees.

Ann Dahms of Gebhardt & Kiefer, P.C.: Each year we take our staff into New York for dinner and a Broadway show.

Elli Albert of Fox Rothschild LLP: Food, food, and more food! I am still new at my firm, but I have never seen one where there is such a constant feeding of the masses. We do a lot of other things here for our people: Jeans Fridays once a month with a donation to a charity-of-the-month, flexible schedules, interactive staff meetings, anniversary recognition, socials (we had a Halloween Party for employees, kids, and pets in October; and a Pot Luck luncheon in November), an on-site gym, a comprehensive wellness program, and individualized IT training programs. My employees also like my recent addition of a confidential Suggestion Box.

Veronica Hurless of Orloff, Lowenbach, Stifelman & Siegal, P.A.: One of the more special things that we do is an anniversary reception every year or two to acknowledge employees at 10, 20 and 30 years. It is a catered event with hors d'oeuvres and fancy vegetable displays in our large conference room, and includes wine and speeches and gifts. Everyone always looks forward to it.

Ed Miller of Norris McLaughlin & Marcus, P.A.: Ensuring employee happiness is crucial to our success. We do this in a variety of ways throughout the year. Our events include an annual Holiday Party, Administrative Professionals Week events, a football tailgate party, and a Summer Kick-off BBQ. Spouses, significant others, and children are invited to several events each year. We recognize above-and-beyond performance, hold prize raffles, offer on-site Zumba classes, participate in Denim Days, and host a Halloween decorating contest. This year we also implemented "Summer Fridays" with an adjusted work schedule. Overall, we listen to employee feedback, and actively brainstorm new ideas to keep our employees happy. Our main focus is to make everyone feel like they are part of one team that helps contribute to the success of the firm.

Elli Albert is the Office Administrator of Fox Rothschild LLP in Roseland

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OR IF YOU WANT TO BE PART

OF AN NJALA COMMITTEE,

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OR BOARD MEMBER (See Page 3).

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