

NJALA *New Jersey Association
of Legal Administrators*

 A Chapter of the Association of Legal Administrators

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**It's All About
The Clients
Special Conference Edition**

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ON THE COVER

The imposing CN Tower in downtown Toronto, Canada, the scene of the ALA Annual Convention, is shown on the cover. Scholarship winners' articles and articles about Client Service are included in this edition.

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JER-Z JOURNAL

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CLIENT SERVICE

By AUDREY SERBAN

This month's Jer-Z-Journal edition is all about "client service." This is, naturally, something that I am very passionate about and experience daily. In my mid-teens to early 20's I worked in the retail industry and, as you probably know, retail is all about client service. Whether I was selling chewing tobacco or a \$200 bottle of perfume, I did it with a smile. Client or customer service was not something that I was taught, but instead learned by observing others who provided great service. I observed and always thought to myself "am I acting towards someone the way I'd like to be treated and more?"

After leaving the retail industry, I realized that regardless of the industry or company where I work, the common denominator or differentiator is always excellent client service. At my Law Firm, my clients are now the attorneys and staff members with whom I work on a daily basis. As the Firm's Office Manager, a portion of my role is to make sure that everything is running smoothly. I maintain a "what can I do for you?" attitude. However, as we all know, you can't make everyone happy. Handling dissatisfied people appropriately is key. It's inevitable that we'll each face an angry or disgruntled person at some point at work. It's critical to use exceptional service skills to diffuse and overcome these situations successfully. Here is a summary of some suggested steps to take:

- Always state what you CAN do to fix a situation— don't lead with what you can't or won't do.
- Be solution-focused.
- Allow irate people to vent without interruption.
- Listen carefully so you don't have to ask them to repeat their vent.
- Diffuse anger by saying, "I'm sorry," or "I apologize." Even if you're not responsible for the problem you can be sorry that someone else is going through a difficult situation. Be empathetic.
- Follow up afterwards to make sure an acceptable solution is in place and that the other person is satisfied.

Another client service standard is to collaborate and work

as a team. This is an important standard because of the many benefits collaboration delivers, such as: the development of well-trained back-up assistance and coverage; assuring a fair and even workflow and workloads; good morale and esprit de corps; and producing a satisfying client service experience for co-workers, clients and anyone else dealing with the Firm.

There are actions that you can do in your management role to foster better collaboration within your office. For instance, you should always and consistently insist on good communications, especially when help is needed or available. Tell your team to let others know they need help or let others know they're available to help. Make sure people know they don't need to wait to be asked. Additionally, standardize work processes as much as possible so that it is easy for one person to step in for another. Cross train staff to help with other roles (e.g., in many offices the receptionist also performs billing duties or clerk duties when their time permits). Lastly, you should remind everyone to be flexible to new or different ways of doing things and not to be strictly wedded to the status quo.

As a board member of the NJALA, I consider all the NJALA members as my clients. As a board, we collectively strive to provide the best client service to all of our members. We accomplish this through educational seminars, networking events, and services provided by our Business Partners. NJALA is actively working on updating our website to provide even better service to you. However this organization is not just about the board members providing service but also about each member providing client services to each other. Each time someone asks a question through the ListServ and this member receives prompt responses from other members, we are all collaborating as a team.

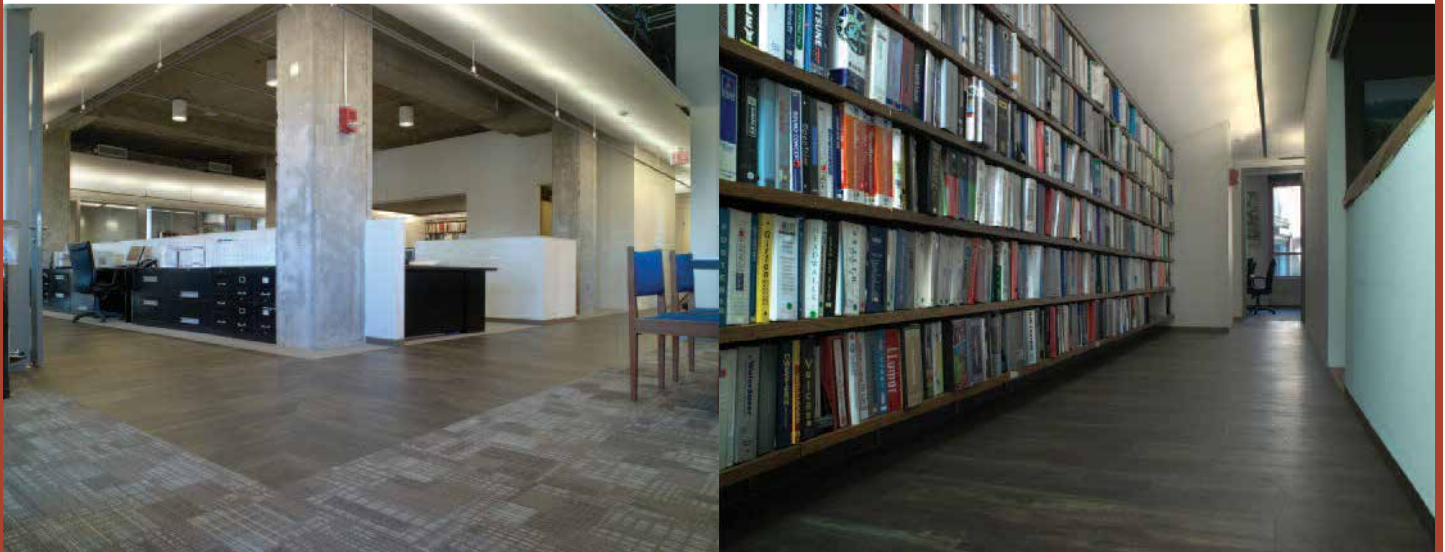
The magnitude of information many of you have shared with me over the years has been absolutely invaluable. I look forward to continuing to have each of us provide the best client service to each other.

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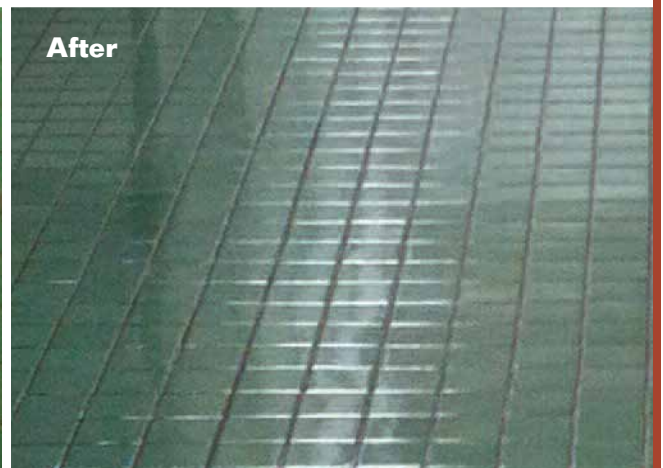
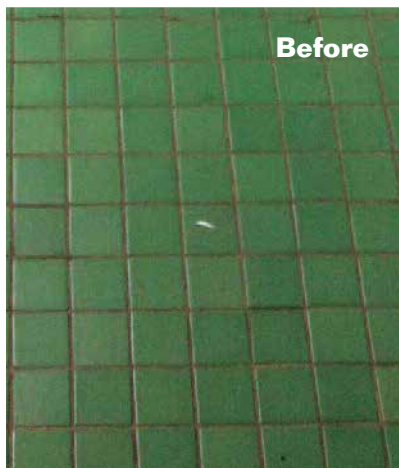
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FORM 8300 - ARE YOU IN COMPLIANCE?

BY KENNETH WINSLOW, CPA

Has your firm ever received a large cash payment or a series of cash payments, and you were not quite sure about possible Internal Revenue (IRS) reporting obligations? Generally the IRS requires an individual or a business to file a Form 8300, "Report of Cash Payments Over \$10,000 Received in a Trade or Business."

The Form 8300 is designed to identify possible money laundering or illicit activities because the IRS believes that those who pay in cash do not want a paper trail and may be involved in illegal activities. The information provided by Form 8300 provides valuable information to the Internal Revenue Service (IRS) and the Financial Crimes Enforcement Network (FinCEN) in their efforts to combat money laundering.

Under IRC §6050I, the law requires any person engaged in a trade or business who receives more than \$10,000 in cash in any one transaction, or two or more related transactions, to report the transaction to the IRS within 15 days of receipt of the cash using Form 8300. The \$10,000 threshold is cumulative and if multiple payments are received within any 12 month period, Form 8300 must be filed within 15 days after the payments equal or exceed \$10,000. There is no general exception for attorneys regarding this reporting requirement.

In certain situations cashier's checks, bank drafts, traveler's checks and money orders are treated like cash for determining the Form 8300 requirement. Generally, since attorneys are not involved in the retail sale of consumer durables, collectibles or travel and entertainment, reporting of monetary instruments is not required. However, if the attorney is aware or should have known that the use of monetary instruments was meant to avoid the filing of the Form 8300, such monetary instruments become reportable.

The law requires that a properly filed Form 8300 contain the cash payer's name, address and tax identification number, as well as the amount of cash received and the date and nature of the transaction. Any business filing a required Form 8300 must also furnish a written statement to each person identified on Form 8300 by January 31 of the succeeding calendar year.

A copy of the filed Form 8300 should not be enclosed. A copy of the written statement must be retained by the business for five years. The statement must show:

- The name, address, and telephone number of the person to contact for the business;
- The aggregate amount of reportable cash received during the calendar year; and;
- Disclose that this information was reported to the IRS.

The IRS proposes to assess civil penalties for failure to file Form 8300 or for filing an incomplete Form 8300 in a timely manner. Civil penalties range from \$50 to \$250,000 depending on the circumstances for noncompliance. When the failure is due to intentional disregard of the cash reporting requirements, the amount of the penalty the IRS may impose is the greater of \$25,000 or the amount of cash received in each transaction, not to exceed \$100,000. In addition to monetary penalties there is also the potential for imprisonment.

In certain instances involving "special circumstances" the preparation and filing of Form 8300 may violate attorney-client privilege. "Special circumstances" may exist when disclosure of the Form 8300 information reveals a confidential communication, such as the motive or reason the client consulted the attorney, or provides a "last link" to such information. Although a client-identifying safeguard called the "Last link doctrine" was established, invocation of this doctrine as a defense to the disclosure required by section 6050I has been consistently unsuccessful.

Attorneys may attempt to rely on the attorney-client privilege to avoid disclosure of client-identifying information to the IRS. Between 1991 and 1995 several court decisions ruled in favor of the IRS' position that client-identifying information required on Form 8300 is not privileged: these cases include United States v. Goldberger & Dubin, P.C. 935 F.2d 501 and United States v. Leventhal 961 F.2d 936, amongst others.

Although several state bar associations have issued ethics opinions stating such disclosure without a client's permission

(Continued on page 38)



INTRODUCING THE BUSINESS PARTNER “Opportunity Knocks Initiative”

The NJALA Business Partner Committee is pleased to introduce the new “**Opportunity Knocks Initiative**,” an incentive program designed to introduce YOU to the 2014/2015 Business Partners.

Program Rules:

- Members must meet with at least three Business Partners that they have not met with before.
- Meetings must be at least 15 minutes long, in person, and two of the three meetings must be outside of an NJALA event.
- At least one of the three meetings must be with a new Business Partner.
- Each meeting will be reported to the Chapter Business Partner Committee with the Business Partner copied.
- All three meetings must take place between April 1st, 2014 and October 31st, 2014.

Members who schedule three meetings in accordance with the guidelines outlined above will be entered into a raffle for a chance to win a Scholarship to the 2015 National Conference or a \$500.00 Amazon gift card.

Business Partner Committee:

Mary Ellen Dolan, Kurt Brown, and Louise Ruffo



CLIENT COMMUNICATION: ETHICS AND PRACTICE

BY DEIRDRE PETERSEN

Establishing and maintaining effective communication with the client is an essential component of the professional delivery of legal services and the development of the successful long-term attorney client relationship.

The ethical requirement for client communication may seem obvious, but the practical aspects of client communication can be one of the most challenging hurdles of a legal matter. According to risk management statistics, a startling number of malpractice matters as well as ethics complaints allege the lawyer's failure to communicate.

The ABA Model Rule 1.4 on communications addresses the lawyer's fundamental duties when communicating to a client about the progress of their case:

- (a) A lawyer shall:
1. promptly inform the client of any decision or circumstance with respect to which the client's informed consent is required;
 2. reasonably consult with the client about the means by which the client's objectives are to be accomplished;
 3. keep the client reasonably informed about the status of the matter;
 4. promptly comply with reasonable requests for information; and
 5. consult with the client about any relevant limitation on the lawyer's conduct when the lawyer knows that the client expects assistance not permitted by the Rules of Professional Conduct or other law.
 6. A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation.

In most cases, the client has engaged a lawyer to advise them with respect to an unpleasant or difficult situation. When there is ineffective communication, the emotional aspects of the matter, looming deadlines, and often slow moving process, add to the already stressful situation and can often times further muddy the perception of the relationship. Fortunately with some focus on the situation, it is possible to improve the approach to communication by all in the firm and move toward greater client satisfaction.

Set Expectations

At the beginning of the relationship, set reasonable expectations with the client. For those clients new to the legal arena, clearly

outline the legal process.

Within the firm, introduce the client to the individuals they will be communicating with: attorney, paralegal, and staff. Describe the role each individual will play in the representation and provide appropriate contact information for those individuals. Discuss the times when those individuals are generally available to the client. Explain the limitations of the information the staff can provide and the limitations of communications with the attorneys while they are in Court.

Obtain information as to how to reach the client and their preferred avenues of communication: telephone, email, written correspondence, and best times to reach the client via those avenues. Make sure that information is kept current and shared with the individuals working on the matter.

Establish guidelines for communication throughout the relationship. What is expected by each party? How will the parties keep each other informed of developments in the matter? Specifically discuss the expectations for return calls, emails, and correspondence. Devise a plan for the management of calendared items. Schedule status updates. Share this information with all involved in the matter.

Listen to the Client

For the most effective communication, listen to the client. It sounds obvious, but lawyers are fast-paced problem solvers and they generally have well-worn paths to their solutions.

Take the time to get to know the client beyond their present issues. Learn about their experience, their industry, and their interests. Clearly identify the current and long-term goals and objectives of the client. Ask questions and get clarification. Listen to the client's ideas and concepts. The representation must reflect the client's interests. A greater understanding of the client's unique perspective may provide insight as to their decision making strategy and possibly lead to innovative solutions.

Be Proactive

Clients want to know developments immediately. Do not wait for the client to call. The delivery of good news is generally easy, however, the delay of the delivery of bad news is often times interpreted negatively. Deliver all developments promptly and objectively.

(Continued on page 9)

Client Communication

(Continued from page 8)

Never let the bill become the status update. Check in with the client regularly. When the case is very active this is generally not an issue, but if the matter has slowed, weeks and sometimes months can go by with no developments. Send a quick update. Continue your status conferences regardless of the activity.

Keep Clients Involved

Communicate with the client in a way that will prepare the client to be an equal participant in the legal process. The issues are the client's and technically the decisions must also be the client's. The lawyer must clearly communicate with the client regarding complex issues in such a way that the issues are clear to the client.

The client must be provided with the pertinent information

and advice necessary to move forward in the decision making process. Adequate discussion of the issues and strategy prior to final decisions will prevent substantial frustration in the end.

The delivery of legal services in the most professional and responsive way is the goal. Communication is key in realizing that goal. Regardless of the means of communication, setting the expectations, understanding the client, and keeping the client involved throughout the process will likely lead to a successful and lasting relationship.

Deirdre Petersen is Administrator at Skoloff & Wolfe P.C. in Livingston.



FIVE THINGS TO HELP BOLSTER YOUR LINKEDIN PRESENCE

BY JENNIFER LOBIANCO

So many people underutilize LinkedIn. After they initially sign up, they make very little updates or manage it at all. This is a big mistake. LinkedIn is a business tool that needs to be part of your everyday life.

There are a few things you can do immediately on LinkedIn that will help improve your profile, put you in contact with the right people to help grow your business and allow you to receive the right search engine attention.

Here are 5 tips:

1. Update your title:

It is important that you write a title that describes what you do and doesn't simply state your job description. This not only helps inform other members of your skills but also search engines can read this too.

2. Update your summary:

This is critical—many people view LinkedIn profiles and don't get past the summary paragraph, so call out your main value propositions so they get noticed right away. Also, write out the names of key companies you have worked for or with—this also helps with credibility and search results.

3. Update your job descriptions and not just your current one:

Many times people scroll through your past work history to see if there are capabilities they are looking for that perhaps they didn't see in your summary.

4. Join 50 groups:

LinkedIn allows you to join 50 groups so why not? But join those that will allow you to make an impact, those with maybe 100 or 200 members where you can comment on topics and be heard.

5. Focus on testimonials not endorsements:

Ask for testimonials after you write one for someone else—they will reciprocate nicely. And don't worry about endorsements, the amount you have of each skill doesn't get you a gold star in my book; written out testimonials provide so much more value.

Jennifer LoBianco is Partner/Chief Strategic Officer of 8fold® Integrated Creative Works in Morristown. Jennifer can be reached at 973-380-0070, ext. 102, or by email at jennifer@8foldworks.com.

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CRM: LET'S NOT CALL THE WHOLE THING OFF

BY ED MILLER

Many times when I meet with my firm's attorneys, I discuss how they should be utilizing the firm's CRM system to help with their marketing and business development activities. More often than not, the first response I get is "What is CRM?"

CRM is an acronym for Customer Relationship Management. Of course, in the legal profession, we do not have customers, we have clients. As George and Ira Gershwin wrote in *Let's Call the Whole Thing Off*, "...You like tomato and I like tomahto..."; customers and clients are the same thing, just said differently.

CRM is the overall marketing strategy for interacting with all of the firm's contacts, including clients, prospects, and referral sources. The primary tool used for managing the firm's contacts is a CRM system which is a database-driven software program. The two most popular CRM systems for law firms (that I am aware of) are ContactEase (my personal choice) and LexisNexis® InterAction®. There are also many other customizable CRM systems on the market.

Before implementing a CRM system at your firm, be clear about what it is and what it is not. CRM is not merely a software program where you hit a few buttons and magically get new clients. CRM is the coming together of people, processes, and technology. Unless you get the right people in the firm involved, create the proper processes, and have the correct software for the job, your CRM program is destined to fail. At the onset of implementing CRM, all key players of the firm's management need to be involved. This team may include the administrator, IT professionals, marketing professionals, attorneys, and assistants. The team needs to determine what the CRM hopes to accomplish.

Some items that should be addressed before deciding on what technology to implement are budget; number of CRM system users and who they will be; what other programs must the CRM be compatible with; what information will be collected and who will be responsible for maintaining it; what training is necessary; what processes will be created to gather information; what types of reporting the firm needs; and how do we get our people to buy-in to the CRM, which means cooperating with the information gathering.

Once the aforementioned items are tackled, a vendor or software package needs to be chosen. In my opinion, a

successful CRM program must, at least, be able to accomplish the following:

1. Inventory the firm's most precious assets— its clients, prospects, and referral sources
2. Keep accurate data for each contact, including name, title, address, email, website, matter information, attorney relationship information, and industry information
3. Have flexibility to create targeted marketing strategies
4. Work easily with other applications such as email marketing software or financial software
5. Manage, plan and track contact "touches" such as direct mail/email, seminar invitations, event planning
6. Create meaningful reports

As you can see, a CRM software program is much more than an electronic rolodex or holiday card list.

To best illustrate the benefits of a good CRM system, I will discuss the ways in which I utilize our firm's on a daily basis. With over 40,000 contacts, I am able to see at which companies we have multiple relationships. This allows me to identify potential cross-selling opportunities. I am able to track the progression from the time a prospective client is entered into the system until he or she becomes a client. I can also see all of the firm's "touches" over this time period. I am also able to plan events (i.e. seminar) where my CRM system easily creates tailored invitation lists and tracks RSVPs and all related follow-up activity. I am able to undertake niche marketing activities such as hosting a cocktail party for female accountants in Somerset County. I can easily do new subscriber email campaigns for our numerous blogs. I can track who sends us business so that we may reciprocate and/or send thanks accordingly. I can issue press releases and run media campaigns. The CRM system is the lifeblood of our marketing department.

While implementing a CRM system takes much planning, work, time and money, it is well worth the effort and expense. You can either (or eyether) spend the time and money now to implement this great tool, and you will neither (or nyther) regret it or remember how you got along without it, or you can continue to postpone the inevitable success of implementing a CRM. Just don't call the whole thing off.

Ed Miller is Chief Marketing Officer of Norris McLaughlin & Marcus, PA in Bridgewater.



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RAINMAKERS: WHO ARE THEY AND HOW DO FIRMS DEVELOP MORE OF THEM?

BY GORDON LOEB

The following is based on a recent interview with Dr. Larry Richard of LawyerBrain LLC, conducted by Gordon Loeb of Loeb Consulting Group. Dr. Richard is the founder and Principal Consultant at LawyerBrain LLC, a consulting firm that focuses on improving lawyer performance through personality science. He formerly chaired the Leadership and Organization Development Practice at Hildebrandt International, and before that provided similar services at Altman Weil. He is a leading expert on law firm leadership practices and group dynamics in law firms and the nation's leading expert on lawyers' personalities.

First of all, let's define a rainmaker. Dr. Richard's definition of a rainmaker is someone who brings in more than enough business to keep themselves busy and hand off work to others.

Sounds relatively simple (and we all know that's not the case) so let's discuss some of the ways to get there and some of the personality traits that can help or hinder rainmakers.

People who have the personality to be rainmakers will be successful wherever they are, in small firms or large firms. "Hunting in packs" in large firms allow the rainmakers to work together to get larger institutional business.

There are several different strategies for making rain. The most common and popularized is the sales personality: glib, extroverted, meets everyone, makes friends with the taxi driver and the clerk behind the counter. This is the steadiest of the strategies. If you are not of this personality, you are not out of luck as revealed in the next two strategies.

An expertise strategy works better for introverts; writing articles, giving speeches, becoming known in a segment as the go-to person for one specific thing. The issue for this strategy is focus. As Dr. Richard says, people buy specialists and employ generalists. People come to them for their expertise and once the trust is established around that initial skill, a halo

effect broadens the client's trust to other skills and professional services that the lawyer may be able to provide.

Another rainmaking approach is the internal expertise strategy or lawyer-to-lawyer strategy. Lawyers can build up relationships with other lawyers over time and complement each other's areas of expertise. Extroverts can partner with introverts and/or one practice area can partner with another to reciprocate referrals.



Dr. Larry Richard

Based on research using the Caliper Profile, there are significant personality traits that most sales-driven lawyer rainmakers score higher on: Ego Drive, Cognitive Empathy, Resilience, Sociability and Conscientiousness. The first three are the most significant:

- The more Ego Drive one has, the more they are psychologically driven to convince, persuade and get others to agree with them. They enjoy the thrill of influencing others.
- The more Cognitive Empathy one has, the more one understands how the customer/prospect is thinking and what's important to them. If Ego Drive is the engine that drives the rainmaker, then Empathy is the steering wheel that helps direct the effort and focus.
- The more Resilience one has, the more the rainmaker can handle rejection from being told no and can continue to forge forward to continue the business development process. These lawyers know it's a numbers game and they don't get easily demoralized by rejection.
- Sociability refers to the fact that one likes human beings and connecting. These rainmakers are open and vulnerable in relationships, authentic, transparent, and trusting. High scores on this personality trait can soften some of the perceived harshness of the Ego Drive trait.
- Conscientiousness refers to thoroughness and the desire to plan their work and work their plan. If a lawyer contacts 10 people per day, 9 will reject, but one will say yes. Lawyers who score high in Conscientiousness are often able to bring a level of personal discipline to the business development process.

(Continued on page 15)

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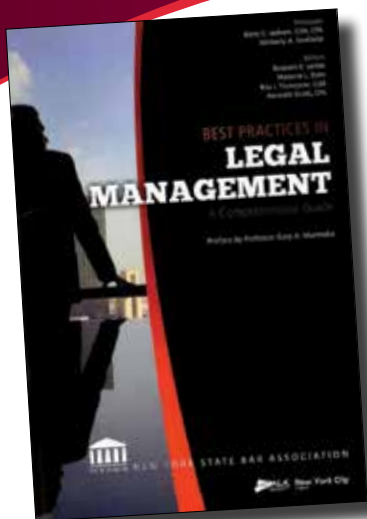
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Rainmakers

(Continued from page 13)

So how can law firms develop rainmakers? The answer is to triage them into the following groups: natural rainmakers; those that have potential; and those who don't have the personality traits or desire to be rainmakers. Our best advice: Get out of the way of the natural ones. They bring in business naturally, and don't really need support or coaching. Although recent research suggests that devoting some resources to helping your best people do what they do best can have a significant payoff.

The middle group is the most profitable group to target with your training and development budget. They have the potential to learn skills and if taught the right method, can approach or reach rainmaker status. Neil Rackham's book *Spin Selling* is one example of a method that has worked well for this group.

The necessity of implementing a rainmaker strategy in your firm has become even more important in the current environment due to the many changes and disrupters that are affecting today's law firms. Less customer loyalty, more focus on pricing and fees, competition from accounting firms launching legal offerings, have all increased the necessity of actively pursuing new business. By having an overall rainmaker strategy, firms can be more successful when hiring potential rainmakers and developing them throughout their careers, benefiting the entire firm.

Gordon Loeb is Chief Operating Officer at Loeb Consulting. Gordon can be reached at 866-987-4111.

NEW MEMBER SPOTLIGHT

INTRODUCING OUR NEWEST MEMBERS OF NJALA

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WE ARE ALA: PLAYMAKERS

BY KURT BROWN

Playmakers? What exactly is a playmaker? Well, *Merriam-Webster* defines playmaker as “a skillful player in sports like basketball, soccer, and hockey who makes plays that help a **team** to score during games.” The playmaker doesn’t have to be the one scoring, but often is the one assisting others to score for the team. The term playmaker is often associated with sports but we are all playmakers in life and in our roles as Legal Managers. Your Board of Directors are also playmakers, creating scoring opportunities for our chapter. This year’s Chapter Leader Institute (CLI) was designed around a sports theme and frequently included terms such as “Training Camp,” “Playbook,” Coaching,” and “Scorecard,” to name a few.

The 2014 CLI was held on July 17th through July 19th in San Antonio, Texas. Home of the Alamo, the River Walk and of course, the Spurs. Southern Texas in the middle of July? What were they thinking? Accompanying me on my travels were Audrey Serban (President), Robbin Dolan (Vice President—Programs) and Doreen Marino (Vice President—Membership). Doreen and I were the rookies, this being our first CLI. For Robbin, this was her second and I believe Audrey has a lifetime membership as this was her fourth CLI.

The program kicked off with a moving and inspirational speaker by the name of Scott Burrows, who is the author of a bestselling book titled “*Vision, Mindset and Grit— How to Stand Up When Life Paralyzes You.*” Mr. Burrows was a talented athlete who played college football at Florida State and was a top ranked kick-boxing champion. All that came to a dramatic halt when he was involved in a serious automobile accident that left him paralyzed from the chest down and he was diagnosed a quadriplegic. Despite the perceived harsh outlook that lay ahead, Scott was determined to live his life using three principles: “**VISION** helped him see complete success in his mind’s eye first”: “Using **MINDSET**, he let go of the past and focused 100% on what he could control”: and “with **GRIT**, he determined to take action and persevere until he succeeded.” Scott encouraged the audience to stand up to their challenges and then he proceeded to stand up from his wheelchair and walk about with the aid of a golf club for support. Needless to say, I did not see that one coming. The lessons learned were many but one in particular stood out for me: “Let the anger pass through you rather than control you.”

The weekend consisted of many sessions centering on the key components affecting all chapters such as Leadership, Business Partner Relations, Educational Programs, Membership, and Community Challenges. Because there were four of us attending CLI, we decided to break up the sessions so each of us could participate and exchange ideas in a wide variety of subject matters.

The first session I attended was titled “Making the Goal: Recruiting and Engaging Members for a Winning Chapter.” Some of the objectives included the identification of the demographics within your chapter; recruitment, including the significance of engaging member to member recruitment; and the features and benefits of membership and how to measure the ROI. What was astonishing to find out was that 97% of our membership includes individuals born between 1946 and 1983, what is more commonly known as Baby Boomers and Gen X, with Baby Boomers outweighing Gen Xers by 2 to 1. Unless we start more aggressively recruiting Gen X, Gen Y & Millennials, the future of ALA could look desolate. Recruitment is very important to the continuance of this chapter and we can all be ambassadors and encourage others to join and participate in our organization. It was shown in this session that the cost for the features and benefits of membership in ALA and local chapters has a return of approximately 6.75 to 1. What that means is that for every \$1 spent toward ALA & NJALA, it would have cost you \$6.75 to obtain the same features and benefits outside of our organizations. That’s an impressive ROI.

As a member of our Business Partner Relations Committee, I looked forward to attending the session “Elevating Our Business Partner Relationship to A League of Their Own.” It was a very lively and interactive session. The panel consisted of many of the VIP partners of ALA. The rapport between our business partners, ALA, and NJALA is that of R.E.S.P.E.C.T: **R**elationship, **E**ngagement, **S**haring, **P**atronizing, **E**ducation, **C**onnection, and **T**ips. What was common throughout our discussions was the building of relationships. Our business partners understand that every chapter member may not be in need of their goods or services. They do know however, the importance of building solid relationships. That same chapter member may be able to recommend them or possibly use their services down the road. What I learned most from this session was that our business partners like the exposure in the way of

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We Are ALA

(Continued from page 16)

ads, writing articles, etc. However, they **love** the interaction with our members, and being included in our community challenges, appreciation night, etc. The Business Partners are the sustenance of NJALA and we appreciate the support they give us.

Probably the best experience I gained from attending this year's CLI, was the interaction with fellow chapter leaders and the ability to network with them, the ALA Board, staff, regional directors, and representatives. It was enlightening to hear what other chapters were doing and how they tackled the problems that we all have in common. The ability to share our stories and exchange ideas, whether it was about attracting and engaging more members or how we get more members involved in our community challenges, was invigorating. To quote our illustrious NJALA president (Audrey), "I attend ALA national and regional conferences to better myself in my firm. I attend CLI to better myself in my chapter." Having experienced my first CLI, I am sure I will be back to attend others. I can't wait to discuss several ideas with my fellow board members and hope to incorporate some of what I learned into new or enhanced programs.

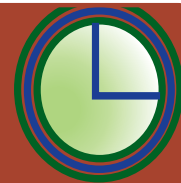
If you would like to hear more about CLI or how you can get further involved in NJALA, just email me and I will be happy to discuss anything with you.

Kurt Brown is Executive Director at Einhorn Harris Ascher Barbarito & Frost, P.C. in Denville.





A Quarter Past



May 2014

The 2014 Managing Partners' Night was held on Tuesday, May 13, 2014 at the Manor in West Orange, New Jersey. Andres Tapia of Korn/Ferry presented *Managing Diversity of Personality and Style in Your Law Firm*. Mr. Tapia also signed copies of his book *The Inclusion Paradox (The Obama Era and the Transformation of Global Diversity)*.



Shown, from left: Andres T. Tapia; Sponsor, Kim Haduck, Account Executive, Veritext Legal Solutions, Livingston; Gary R. Botwinick, Managing Partner and Linda Gerber, Personnel Manager of Einhorn, Harris, Ascher, Barbarito & Frost, PC, Denville; Charles M. Forman, Managing Partner and Judy Sotardi, Office Manager of Forman, Holt, Eliades & Youngman, LLC, Paramus.

The ALA Annual Conference and Exposition was held at the Metro Toronto Convention Center in Toronto, Ontario, Canada from May 19 through May 22, 2014. Several NJALA members had a chance to attend and are providing some scholarship winner articles within this issue.



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The Volunteer and Business Partner Appreciation Night was held on Thursday, May 29, 2014 at Classic Thyme Cooking School in Westfield, New Jersey. Those in attendance participated in the cooking of a French cuisine dinner. Great time was had by all. Thanks to the volunteers.



Shown from left: Mary Ellen Dolan, Office Administrator, Greenberg Traurig, LLP; Audrey Young, Firm Administrator, Starr Gern, Davison & Rubin.

(Continued on page 20)

A Quarter Past

(Continued from page 19)

June 2014

A Lunch and Learn Workshop was held on Thursday, June 5, 2014 at the offices of Budd Lerner, PC, in Short Hills. Robert Gelman, President of TAME Software & Consulting, lead the workshop *Top 10 Trust Accounting Blunders and How To Avoid Them!*



Shown from left: Robert Gelman, President of TAME Software & Consulting; Audrey Serban, Office Manager, Fisher & Phillips, LLP; Mitchell Rait, Partner, Budd Lerner, PC.



The June Social was held on Wednesday, June 11, 2014 at the Rock Spring Country Club in West Orange. The Chapter hosted a Casino Night where members had a chance to play without losing a dime. A great time was had by members and business partners!

The New Jersey Association of Legal Administrators (NJALA) conducted a 50/50 raffle at their annual spring meeting to raise funds for Down the Block, a Millburn / Short Hills-based charity providing short-term assistance to local households facing unexpected financial setbacks. The raffle raised \$626.



Shown from left: David Sotnick, Down the Block, Co-President; Mitchell Rait, Partner, Budd Lerner, PC; and Wendy Minocha, Down the Block, Co-President.



HATCHES, MATCHES & DISPATCHES

BY CINDY LANDIS

Summer is one of my favorite times of the year. Humid weather and all. Of course, when October arrives I am happy to wake up to the cool weather and put on a heavy sweater.

By the time you read this, we will be thinking of pumpkins and apple pie...

My son, Steven, graduated from Quinnipiac School of Law on Mother's Day, May 11, 2014. Tears came to my eyes—I couldn't have been prouder. Steven also received the Dean of Students Award in addition to academic honors.



From left: Cindy, my daughter Carol, Steven (the graduate), my husband Phil

A week later I was off on my drive to Toronto and the ALA conference. My husband and I stopped on the Canadian side of Niagara Falls. It was a very quick view as the rains were coming down with no clearing in sight.



Niagara Falls in the pouring rain

In July, I took a day off and drove to Chestertown, MD with my two sisters to visit my daughter. We spent the day in St. Michaels, MD with two of my nieces.

And now for news from some of our NJALA members:

Angela Segal (Latham & Watkins, LLP) and her husband **Steven Segal (Podvey Meanor Catenacci Hildner Coccoziello & Chattman, P.C.)** had their first grandchild, born Monday July 14th— 3 weeks early! Harrison Segal weighed in at 5 lbs. 10 oz. Their son, Andrew and his wife Marissa, not to mention all the first time grandparents on both sides, were over the moon excited! The little guy had to spend a little time in NICU but came home shortly thereafter.



Harrison Segal

Ron Henry (Wilentz Goldman & Spitzer) went on a tractor ride with granddaughter Norah and daughter-in-law Liz. They went blueberry picking over the 4th, and face painted too!

(Continued on page 22)

Hatches, Matches & Dispatches

(Continued from page 21)



From left: Henry, Liz and Norah



Norah, with a beautiful smile

Audrey Serban (Fisher & Phillips, LLP) on stage with Belinda Carlisle from the Go-Go's at the Mayo Center. Belinda called up people from the audience on stage. She pointed in Audrey's direction so she ran up there. Audrey isn't sure if she was specifically pointing to her but she just assumed she was.



Audrey with the Go-Go's

Patricia Isaacson (Seeger Weiss LLP) reports that four of their current paralegals have been accepted into Law school for 2014. Amanda Meehan, Amberly Beye and Helen Balut will all be attending Seton Hall law school at night while continuing to work at the firm. Justin Freedman will be attending Seton Hall full time and sadly will be leaving the firm this month. They are so proud of their paralegals and those who are taking the LSAT's this fall with the hopes of following in their colleagues shoes and attending law school in the future.

Seeger Weiss is proud to inspire, encourage and cultivate excellent legal talent. Many of their staff start part time as students in college, become full time paralegals when they graduate and then go on to law school as Amanda Meehan is doing now. Michael Hughes, a current associate attorney with the firm, started as a part time student while in college and continued on with the firm while in law school and now handles our recruiting efforts for new paralegals and students from Seton Hall.

Nancy Fosina (Maraziti Falcon, LLP) reports that she and her husband, Bill, had their third vacation this year (Bahamas in February and Marco Island in May to celebrate their 45th Anniversary), this time to the Outer Banks of NC to spend quality time with their two daughters, their spouses, and six grandchildren. Also sharing the house were Bill's brother and his wife as well as their two daughters, their spouses, and three grandchildren. Luckily, the house was large enough for all and despite Hurricane Arthur, which "blew" through during the early morning hours, a wonderful time was had by all from the 3 year old to the 71 year olds! Lots of beach and pool time, games, exercise and, of course, eating and drinking. They are planning on another joint vacation soon.



The entire crew on the front steps in the Outer Banks



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UP TO THE MINUTE . . .

SUMMARY OF MINUTES OF THE NJALA EXECUTIVE BOARD MEETINGS HELD THROUGH JUNE, 2014

BY MARY BETH DONOGHUE

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

President's Report

The Board unanimously agreed to invest into the upgrading of the NJALA website. There is a strong desire to be able to provide better benefits through the website for all members including more user friendly functions, retainage of survey information and educational webcasts and recordings. After a detailed presentation, the Board has retained Algonquin Studios as a development partner of the new website. A special committee will be put together and significant development is underway.

The Board also created the position of Chair for the President's Award of Excellence and Lisa Cuffari has accepted this position.

Four Board Officers (Audrey Serban, Kurt Brown, Robbin Dolan, and Doreen Marino) attended the Chapter Leader Institute in San Antonio, Texas for guidance in the further development of the Chapter.

Education Programs and Business Partner Exposition

Plans are underway for the Business Partner Exposition to take place in September, and the Expo committee is working with business partners to secure sponsorship.

The majority of educational sessions have been planned and speakers are secured. Suggestions were made at the Chapter Leader Institute that the Board is taking under consideration as educational sessions are being finalized. The Board has several options for Managing Partner Night 2015 that are being explored.

Seven topics for workshops have been decided on and speakers, dates, times, and locations are being finalized.

NJALA presentations at the New Jersey State Bar Association Annual Meeting held on May 14 through May 16, 2014 were a great success. The Board was very pleased with the outcome.

Community Challenge

In response to membership inquiries, the Board is investigating the participation into more charitable events that would be of interest to the members. Fundraising events have been very successful and fundraising will continue to benefit New Jersey charities.

Business Partner Relations

The Board is pleased that we have several new business partners join the Association this year. The Board also introduced a new *Opportunity Knocks* initiative, which is underway.

Newsletter Report

The electronic version of the newsletter has been a success, saving significant costs to produce the newsletter. A Special Edition focusing on the business partners is due to be published in August 2014.



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AVOID THE QUIT & STAY PHENOMENON: ENGAGE YOUR BEST EMPLOYEES

BY CYNTHIA LANDIS

Do you engage your best employees? Have you told them today that they are doing a great job?

While attending the ALA National Convention in May, 2014, Shari Harley of Candid Culture, presented “Avoid the Quit & Stay Phenomenon: Engage your Best Employees.” The room was filled to capacity as she engaged her audience with personal stories on her career working with Fortune 500 companies, speaking at a well-received session in Toronto. At the conclusion of her presentation, it became clear as to the reason for her openness. An objective was to have her audience feel comfortable and get to know her better, which should also be the case for management and support staff within a firm.

On any given day, while driving to work, I plan to the best of my ability, how to complete the tasks that should be attended to before the end of the day. Many of those tasks will be pushed off until tomorrow, but the goal is to cross off a few of those every day. I pull into the lot, find a parking spot, turn off my car, walk up to the second floor, go through the reception area, open the door to my office, and begin with what may very well be the day I did not plan. The red light on the phone is staring at me, emails with “high importance” are downloading onto my computer, and a broken coffee pot are the first of many problems to resolve that were not on my list. I listen to the phone message, make a call regarding the coffee pot (attorneys and staff need their caffeine), and finally sit down to read my emails. I then begin to focus on my goals for the day, or so I thought. An hour later, I see a partner walking down the hall in my direction: what has happened? I now must step into my “HR” shoes...

Working as a legal administrator can entail handling any unplanned occurrence, which may lead to uncomfortable discussions. At times, the first thought may be that an issue will resolve itself, however, that is usually not the case. Don't wait and hope for the best; deal with the issue head-on. It

is imperative to address any issue in a timely manner; this is especially true when dealing with a deficiency in performance or attitude. Be direct: be specific in what you expect and what the company needs. Tell them what you like, what you don't like, and what changes you want to see from them. When you see improvement, let them know. If the situation does not get better, address it again. Think back to a change you have made recently for yourself; did that happen the first time around, perhaps the second? Sometimes it may take more than

two or three times to change behavior, both personally and professionally.

“It is our responsibility, as a professional member of a law firm, to both coach a staff member or members as well as offer suggestions so that they can prosper and excel. Ask what you can do to improve the situation.”

Managing staff has other sides. We all try our hardest to keep our eyes open to what is happening outside our door, but sometimes it is difficult when we are working on another aspect of our job. Keep the door open at all times. You may look up one day and find a staff member looking in, just waiting for you

to stay “would you like to talk?” Create an environment where people will talk to you. Invite them in and hear what they have to say. We all want our employees to feel comfortable and to know we are trustworthy. If they are looking for something and you can provide it, give them what they need. If not, let them know why. If they just need someone to listen, be that person.

We have been hired by our partners to help others get to where they want to go. There may be that one individual who may be struggling with an assignment and/or have personality issues with another employee. It is our responsibility, as a professional member of a law firm, to both coach a staff member or members as well as offer suggestions so that they can prosper and excel. Ask what you can do to improve the situation. Keep in mind that not all situations can be solved immediately and that more than one conversation may be needed. Set the goal by coming to an agreement that everyone involved understands. Follow up as you need to so that the goal is accomplished.

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Avoid the Quit

(Continued from page 25)

“You did a great job.” Just a few words can go a long way. Why not make it a point to offer that sentiment to the one or two people who stayed after hours to finish up a project? I call them the “A” players: they are the ones that you can go to at any time; they will extend a helping hand. Others may see this positive attitude and begin to follow their lead. It can be extremely difficult to stay focused the entire day, and motivation may be a key. The positive attitude of your A players may have a positive effect on the B and C employees. Provide all of them with the opportunity to develop, and use their expertise and knowledge of legal issues to enhance the office environment and skill set.

On any given Saturday afternoon, I might just sit down and start clicking the remote. One of my favorite movies, Legally Blond, has just started. Elle Woods: what a character. She may have said it best ...

Happy people just don't shoot their husbands, they just don't.

Keep your employees happy. They will have a positive attitude towards work, get along with others and help your firm be the best it can be. Thinking outside the box is an art. Listen to an idea someone suggests and encourage that person to take the reins of a project they would like to tackle. It may turn out to be the one change that will be remembered for years. Happy employees will enjoy getting out of bed in the morning and coming to work. Retaining those employees benefits all.

A formula for engaging and retaining employees, as offered by Shari Harley, consists of:

- Getting to know employees better and differently.
- Have meaningful, one-on-one meetings.
- Give feedback every time you meet.
- Ask for and be open to feedback.
- Create opportunities for employees to do the work that interests them most.

I would like to thank the NJALA for allowing me the opportunity to attend the 2014 Annual Conference. My focus was to attend as many human resources sessions as possible, enabling me to return to Gennet Kallmann Antin & Robinson with some fresh ideas. I am happy to say, that is just what I have done.

Cynthia Landis is Office Administrator at Gennet Kallmann Antin & Robinson in Parsippany.

Hatches, Matches & Dispatches

(Continued from page 22)

NJALA Trustee, **Mitchell Rait (Budd Larner, P.C.)** received the Bernard J. Kuttner Pro Bono Service Award for his work on behalf of Covenant House New Jersey, at the Essex County Bar Association Annual Installation and Awards Dinner on April 28, 2014 at the Pleasantdale Chateau in West Orange, NJ. Congratulations Mitch!



From left: ECBA President Kenneth Rosenberg, Partner, Fox Rothschild; Bernard J. Kuttner; Jill Rottmann, Executive Director of Covenant House; Mitchell Rait, Partner, Budd Larner, PC; and ECBA President-Elect Judith Hartz, Partner, Kozyra Hartz.

Robbin Dolan (Laddey, Clark & Ryan, LLP) and her husband Ned are proud but sad that their youngest has graduated from high school. Greg Dolan will be attending The College of New Jersey in the fall and he will be a teacher, majoring in Technology Education.



From Left: Ned, Greg and Robbin

Enjoy the summer...fall is coming...

Cindy Landis is the Office Administrator of Gennet Kallmann Antin & Robinson in Parsippany.

What's on Tap

ALA and NJALA 2014 CALENDAR OF EVENTS

ALA Business of Law Conferences

Visit www.alanet.org for more information.

September 11-13, 2014: Chicago, IL

October 6-8, 2014: Fort Worth, TX

October 27-29, 2014, Philadelphia, PA

ALA Specialty Conferences

Intellectual Property Conference for Legal Professionals, September 18-19, 2014, Washington, DC

Large Firm Principal Administrators Retreat, September 18-20, 2014, Orlando, FL

ALA Corporate Law Department Symposium, October 15, 2014, New York, NY

Human Resources Conference for Legal Professionals, November 3-5, 2014, Las Vegas, NV

Tuesday, September 16, 2014 (6:00-9:00 pm)

Don't miss our every popular Business Partner Expo at Mayfair Farms! This well-attended event provides something for everyone – entertainment, prizes, a chance to mingle with members and to meet our business partners. Educational workshop begins at 4:30.

Tuesday, October 14, 2014 (6:00-9:00 pm)

Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: To State and Local Employment Law Developments and Trends, Presented by David Lichtenburg, Esq. of Fischer & Phillips, LLP. A buffet dinner will be served.

Tuesday, November 11, 2014 (6:00-9:00 pm)

Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: Budgeting, presented by: Cohn Reznick. A buffet dinner will be served.

For information about:

Monthly meetings – Please contact Robbin Dolan of Laddey, Clark & Ryan, LLP at 973-729-1880

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.





COMMUNICATION STYLES AND METHODS

BY KATHERINE DART

For those of whom I did not have the pleasure of making your in-person acquaintance, my name is Kathy Dart; fortunate winner of the 2014 Toronto ALA Annual Conference & Exposition scholarship and I am a Horse! What did this golden ticket mean for me? Not just another stamp on my passport, but, that “A-Ha!” moment I looked for to feel refreshed, re-motivated, rejuvenated, and all the “re-news” about my job, my career, my commitment to my firm. And I did, and it was, all that and more! Why? Because I gave myself permission to relate and to communicate.

Communication as our primary tool is something we all do every day, all day long. In our positions as Manager/Administrator that is what we spend most of our work day doing—communicating new policies, training on new software, office weather closings, new health benefit plans, and costs. Always communicating. And as the old adage goes, “*it’s not what you say; it’s how you say it*”.

I focused my learning at this year’s Conference on communication. I had only very briefly met any of the other attendees, and a solo traveler and attendee, communication was my key to getting in the door to have the best experience I could have. Our only tool that we carry with us everywhere we go (and you do not have to pay extra luggage fees), is our ability to communicate.

At the Conference, my *communiqué voyage* started at breakfast in the Hotel Fairmont Royal York’s restaurant. I arrived every morning and enjoyed, by myself, the complimentary breakfast I was given by management as an apology for the construction scaffolding obstructing the view from my window. No big deal, but yes, thank you, I will take your free breakfast. When I arrived at the restaurant in the morning, I was asked by the hostess, “Breakfast for yourself?” Now I found that very interesting. How I received her communication to me was that it was OK to eat my meal alone, something that is hard for some people to do. She did not ask “Breakfast by yourself?”, which may transfer loneliness and exclusion about someone dining alone. She phrased the question in a way that conveyed not only that it was okay to eat solo, but also I was actually *treating myself* to something very nice.

Because communication is so important, whether traveling alone, dining alone, or presenting to your staff via any method,

verbally in a meeting, newsletter or even e-communication via email or intranet, I’m concerned with *how* am I communicating. Am I an effective communicator? Do I give too many details? Not enough details? Is the message focused? Am I sending the message I want to send, and how is the listener receiving it?

A-Ha!
There it is.

It’s not all about me after all; it’s also about how the listener communicates as well. This is what I learned in Kristine A. Sexter’s presentation “Communication Styles & Methods: Meeting the Needs of the Firm.” By the way, she’s a great presenter! I loved her enthusiasm and energy. If anyone else attended one of her sessions, you know exactly what I mean.

Kristine had this Cosmo-ish quiz to learn about your “Wild Communication Style.” And I learned, I am a Horse! And you might be a Lion! Neither is better or worse than the other. As it turns out, those two communication styles are opposites! That’s why I feel like I am fumbling when I communicate with a Lion. A Horse is ruled more by their emotions and their priorities are harmonious relationships, sincere appreciation, and compromise. A Lion seeks power, and their priorities are getting to the point without over analysis and can be misunderstood as unfriendly.

The Horse and the Lion are quite the opposite. You can find the Horse skipping along holding a daisy singing the “I’d like to give the world a Coke,” whereas the Lion is Varuca Salt from Willy Wonka demanding, “I want it NOW!” Our styles are different and we may send and receive information differently. Pre-conference I would not have had the tools to identify these styles and would have been stuck making assumptions when trying to communicate with the other party. Now, I understand the personality. We spend 60-70% of our time at work. While at work, let’s learn to be polite and courteous. Let’s learn about differences, and appreciate them. Recognizing the differences helps to remove those hurdles in communication when trying to convey your message more clearly for the receiver.

Using Kristine’s overview of communication styles (attached quiz and chart with 2014 Full reprint permission granted to all ALA Members), I’m hoping it will help you, as it helped me, learn how to best communicate with the different animals in my zoo (I mean office). I encourage you to go on-line to

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Communication Styles

(Continued from page 28)

the ALA website and download the materials for this session for your own review. It dives into much deeper pools than I do here. I enjoyed this program so much I worked with our PEO and created a presentation to share with my staff called “Effective Team Communication.” We combined our PEO’s communication power point slides, with Ms. Sexter’s presentation, and added my own notes from my 2014 ALA Annual Conference & Exposition experience. If you would like a copy of my slide show to share with your staff, please contact me at kdart@keefebartels.com.

I am enthusiastic about the feedback I will receive from my colleagues and look forward to a higher level of communication on the daily. I applaud the members of the ALA for giving me this worthwhile opportunity to explore levels of communication. To all of you horses, lions, owls, and monkeys, whatever you are, see you next year!

Katherine Dart is Director of Administration at Keefe Bartels, LLC in Red Bank.

<p>LION: Priorities: Getting results; hitting goals; challenges. Attributes: Task-oriented; pushes for results; decisive; confident; conveys urgency; speaks up about concerns; fast-paced; independent; seeks power. Relate to them by: Get to the point; minimize small talk; focus on end results; avoid over analysis; don’t take their bluntness personally; expect candor. Misunderstood as: Blunt; rude; unfriendly; intimidating; egotistical; loners; aloof; pushy.</p>	<p>MONKEY Priorities: Group inclusiveness; team collaboration; positive relationships. Attributes: People-oriented; generates enthusiasm in others; highly social; talkative; spontaneous; risk-taker; emotional. Relate to them by: Listening; show value in the relationship; praise their efforts; talk in terms of collaboration; teamwork. Misunderstood as: Disorganized; too emotional; in need of lots of recognition; too willing to take unnecessary risks; manipulative; superficial; overeager.</p>
<p>OWL: Priorities: Accuracy; maintaining high standards; order; Objectivity. Attributes: Task-oriented; reliable; logical; questions ideas; skeptical; conventional; serious; slow; cautious; detailed; autonomous; on-time. Relate to them by: Bring facts and research to support your position; do not pressure to make a decision; respect their time; avoid emotionalism. Misunderstood as: Arrogant; fault-finding; too cautious; unemotional; weak; perfectionist; withdrawn.</p>	<p>HORSE: Priorities: Harmonious relationships, stability; support; sincere Appreciation. Attributes: People-oriented; calm; tactful; patient; likeable; loyal; dependable; team players; accommodating; avoids confrontation; risk-adverse; indecisive . Relate to them by: Avoid last minute changes; allow time to process information; be congenial; offer options; be willing to compromise; show respect for their feelings. Misunderstood as: Too accommodating; submissive, indecisive, needing acceptance, unable to complete tasks.</p>



ALA ANNUAL CONFERENCE: TORONTO, CANADA

BY ANNETTE ANELLO

This year, I had the good fortune to win a scholarship to the ALA Annual Conference & Exposition in Toronto, Canada, held May 18 to 22, 2014, at the Metro Toronto Convention Centre.

This year's annual conference was filled with valuable education sessions for both the new and experienced administrators and managers. Although I am not a new administrator, the last ALA Annual conference I attended was in Toronto 25 years ago! I would like to give everyone a glance at the conference experience held in Toronto in 2014.

Toronto was a quick flight from Newark, NJ, as was the shuttle to the hotel. I stayed at the Fairmont Hotel which was the official hotel for the ALA annual conference. The Fairmont Hotel is a beautiful historical building with a great central location. Within walking distance of the hotel we were able to visit such attractions as, the St. Lawrence Market, the Hockey Hall of Fame, the CN Tower, Ripley's Aquarium, and the Harbour Front Centre, just to name a few. The immediate area of the city was under construction, which made it challenging to get around but not enough to diminish the convenience and energy of the venue. Upon arriving in Toronto the weather was similar to the weather we left back in NJ, gloomy and chilly. By the end of the conference it was sunny and beautiful and very pleasant to walk around the City and experience Toronto in its best light.

Although there were some leadership meetings and idea exchanges on Monday during the day, the official start of the conference was on Monday evening with the Welcome Reception. It was great to meet up with colleagues and to start networking and making new friends.

I was very excited about the keynote speaker, Captain Mark Kelly and his address "Endeavour to Succeed." He discussed his experiences as the Commander of the space shuttle, visiting the International space center four times and the tragedy of January 8, 2011, in Tucson, Arizona with his wife, Congresswoman Gabrielle Gifford. He discussed what the experience has been like and her recovery. Captain Kelly's address was extremely heartfelt and all were moved by the strength and resilience shown by his wife, Gabby Giffords.

Following the Keynote Speaker, the Legal Marketplace was open. With close to 160 business partners in attendance it took several visits to cover all of the booths. When you needed a break there was a "Recharge Lounge" where you were able to charge not only your portable devices but your feet with foot massage

machines as well! Want to take a look at the law firm of the future? Gensler provided that vision with an office of the future set up in the Marketplace that was available to tour—our future work environment.

The selection of courses was abundant. While it was difficult to choose what sessions to attend, not one session failed to prove worthwhile.

The IDEA and Association Awards presentation was very exciting and personally very rewarding to attend, since the NJ chapter received the platinum Presidents' Award of Excellence.

The Grand Finale Event was an amazing conclusion to our already packed experience. After three days of educational sessions, networking, and numerous visits to the Exhibit Hall, who could ask for anything better than a lovely dinner, 8th row seats to a REO Speedwagon Concert, and a dessert party at the Fairmont Hotel.

The major difference between the ALA Toronto conference of 2014 and the conference in Toronto in 1989 was apparent in how technology has made an impact on everything from the ALA conference app, to being able to take notes on your Ipad or tablet, and to not having to wait in line to use a pay phone to check in with the office.

This was truly a great conference. My sincere thanks to the chapter for affording me the opportunity to attend.

Annette Anello is Assistant Administrative Manager of Day Pitney, LLP in Parsippany.









I JUST CALLED TO SAY “I’M SORRY” MANAGING GRIEF & LOSS IN THE WORKPLACE

BY JUDY SOTARDI

I was fortunate enough to win a scholarship to the ALA Convention in Toronto, Canada this year (thank you NJALA!). While there I attended a seminar presented by Linda Trignano, entitled, “I Just Called To Say, ‘I’m Sorry’—Managing Grief & Loss in the Workplace.” I highly recommend this seminar.

Grief and crisis affect every business at some time and they have a tremendous impact on the workplace. They affect not only the person in crisis, but also their coworkers as well. Death is not the only type of loss that an employee has to face. There are many types of personal crises or loss, including divorce, miscarriage, serious illness, and family issues, that can impact an employee at home and travel with them to the office. Grief and crisis can also arise from within the workplace itself, including such matters as downsizing, termination, retirement, or layoffs in the workplace. All of these issues affect employees and adversely affect workplace performance.

In the United States, employers lose \$75 billion annually due to lost productivity, absenteeism and increased errors, and accidents relating to employees’ grief and crises. Statistics show that companies that face loss directly return to prior levels of productivity much quicker than those who ignore the issue and simply wait for things to return to normal.

Office administrators and managers face the challenge of finding ways to address employee grief. The work environment today is more complex than ever before. Employees want to feel that employers care for them and will show understanding and empathy during their feelings of loss.

Linda’s seminar offered many valuable tips and insights for addressing employee grief. One of the things that Linda stated in her presentation that I found interesting is that people tend to pre-determine how long it should take someone to recover from a particular loss. For instance, some people might think that it should take you a shorter period of time to get over the loss of a pet than the loss of a parent. However, it is important to realize that the depth of loss varies from person to person and there is no particular timetable for working through grief or loss. You need to allow people time to heal in their own way without judgment.

There are typically five stages involved with grief. They are not linear and can happen in any order. There is denial (shock, numbness); anger (blame); bargaining (yearning); depression (sadness, uncertainty); and acceptance (letting go). Everyone goes through transition a little differently. It can be a very jagged journey, people bounce back and forth, and ultimately one’s performance suffers.

It is hard to balance the needs of the employee against the needs of the firm. Emotions can show up unexpectedly and the person may need to step away or take a break at times. Linda emphasized that it is important to have support available. The person might want to consider additional leave. Some firms offer an “EAP”— an employer-sponsored service designed for personal or family problems including mental health, substance abuse, and similar situations.

Social media provides another means for assisting with the grief process today because it is an expedient way to communicate personal news and the communication is immediate. Posts on Facebook, Twitter or Instagram are often short and written quickly. There are also many free websites available such as The Cancer Survivors Network that are welcoming, safe places for people to find hope and inspiration from others who have “been there.” It is a way for people to tell their story, post images, and exchange private messages with other members.

As a manager, you need to discover stress issues and try to minimize them. It is important to develop flexibility to respond to change and build supportive relationships with people dealing with loss, while at the same time respecting their need for confidentiality. Some employees just need someone to talk with and sometimes just listening is the best help for grieving employees.

Linda’s seminar revealed various ways to communicate more effectively with employees dealing with grief. Her suggestions included:

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I Just Called

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1. Speak with the employee or family to determine what they want to share with the office.
2. Make certain that you know your firm policy.
3. Hold a team meeting to provide details of the grief, illness or other loss event.
4. Decide the best course of action to express sympathy or provide support to the employee or family.
5. Put a plan in place to handle the workload of the affected employee; temporarily or permanently.
6. Follow up with a sense of urgency to ensure that redistributed workload is manageable and that others are handling the change okay.
7. If necessary, plan to meet individually with employees that are not coping well with changes resulting from the loss.
8. Provide resources for additional help if employee needs more assistance.

Never minimize someone's grief or compare their loss to your own. Some of the worst things to say are, "I know exactly how you feel," or, "don't worry you'll be okay," or, "it's time to put this behind you." You are better off saying, "I am so sorry for your loss," or, "I can't imagine what you are going through," or, say nothing and just be with the person. You should listen without judgment.

Linda Trignano was a very powerful speaker and her story and words made such an impact on everyone in the room. Her firm offers grief coaching and three different types of counseling packages depending upon your firm's needs. I would highly recommend attending her seminar.

Judy Sotardi is Office Manager at Forman Holt Eliades & Youngman, LLC in Paramus.



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OOH LA LA...! BUSINESS PARTNER APPRECIATION NIGHT

BY SARAH CLARK, CLM

It seems I have used that phrase a lot in 2014. First, in February, I jetted off to Paris for a long weekend in Paris and spent a long weekend APPRECIATING French Food. Then, in late May, I spent an evening preparing a French meal APPRECIATING our Business Partners and Member volunteers. Yes, you guessed it. I am here to tell you all about our Business Partner and Volunteer appreciation event. On May 29th, once again, we welcomed our Business Partners and some of NJALA's many volunteers to Classic Thyme Cooking Studio in Westfield where we prepared a "French Bistro" meal that was to die for. "Ooh La La" seemed to be the phrase of the evening because everything tasted so wonderful.

We had good company, great food, fine wine, many laughs, and some of us even learned some new cooking tips to boot. For anyone who is unfamiliar with Classic Thyme, this is a participatory cooking school where teams of attendees prepare different parts of the meal and once everything is done, we all sit down and share a family style meal of our creations with our fellow "chefs."

I have attended this cooking school on many occasions, both personally and professionally, and it continues to amaze me that the owner of Classic Thyme, David Martone, always manages to make even the most intricate of meals easy to understand and, more importantly, easy to prepare, which is greatly appreciated by the many busy people in the room. Sadly, because our Business Partner program continues to flourish, and because of our many members who volunteer, we have outgrown Classic Thyme. Hopefully, we will be able to return next year, because in my opinion, this is consistently one of NJALA's best events.

The menu included Salad Nicoise, Crème DuBarry (Cream of Cauliflower Soup), Poulet Sauté Chasseur (Sautéed Chicken with Mushrooms), Burgundy Beef with Mushrooms, Ratatouille, and, of course, Crème Brulee. Surprisingly, many of these dishes have a fairly quick prep time so any of us could easily prepare these at home. The ease of preparation also allowed our attendees to move to different stations and help out allowing for further education and, more importantly, additional networking. I personally can't wait to prepare the cauliflower soup this fall. YUM! If you would like the recipes, please

send me an e-mail and I will forward them (sclark@mdmc-law.com).

The food was, quite simply, delicious. Our chefs worked hard to make sure every step followed the recipe instructions, and thanks to our delicious wine selections, the fun and laughs could be heard throughout the kitchen. Despite all of the fun, the night was really an opportunity to say thanks and show our appreciation to our Business Partners and volunteers who make so many of our programs and initiatives possible.

Many of our volunteers were unable to attend the event and there would be far too many names to list here, but I did want to take the time to thank our many Business Partner Sponsors for their unending support of NJALA.

To all of our member volunteers, I send you a huge "MERCI!"

To our Business Partner sponsors who attended we find you "MAGNIFIQUE!"

- Joe James – MicroStrategies
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Sarah Clark, CLM, is Director of Administration at McElroy, Deutsch, Mulvaney & Carpenter, LLP in Newark.







2014 NJALA MANAGING PARTNERS' NIGHT

BY MICHELLE COHEN

What a pleasant surprise it was for me to discover that I could attend this evening even though my Managing Partner was not available to attend with me! Who knew? I certainly did not know this fact last year, and being new to NJALA I did not realize that I was missing out on such a great night of schmoozing and learning! This year NJALA met at The Manor in West Orange on May 13th, 2014 for Managing Partners' Night. A delicious dinner buffet was served and enjoyed by all, as is always the case at any NJALA event!

During dessert, we were welcomed by NJALA President Audrey Serban and then heard brief remarks from Kim Haduck from Veritext, our Business Partner that sponsored this lovely event. If you were in attendance, then you know what I am talking about when I say that the extremely cool highlighter Veritext gave us that evening was the hit of the office when I came in the next morning. It has long been "borrowed" from me but it is so easy to spot so I know where it is!

We were then treated to an outstanding talk entitled, "Managing Diversity of Personality and Style in Your Law Firm," by Andrés T. Tapia, author of the book, The Inclusion Paradox. Mr. Tapia is a Senior Partner with Korn/Ferry Leadership and Talent Consulting as part of its Diversity, Inclusion, and Talent Optimization Practice. He was previously President of Diversity Best Practices, which is the preeminent diversity and inclusion think-tank and consultancy, which count as its members and clients several hundred Fortune 1000 companies.

Mr. Tapia engaged all of us in a well thought out presentation about how much of our own personal story come with us into the work place. He discussed how we have our own biography and experience, and how diversity impacts our interpretation of events which can then impact our personal and professional lives on many levels. He asked us to consider if we are interested in helping our firms be better negotiators, have better client services, and if we were willing to address our unconscious internal biases. He discussed the inclusion paradox that "equality does NOT equal same" by any stretch of the imagination. This is just the "tip of the iceberg" as Mr. Tapia would say! I could not possibly address all the issues that he touched upon, therefore I would highly recommend taking a look at his book (all participants in this evening got their very own copy of his newest edition).

I thought this evening was a tremendous success and a special thank you needs to go out to all the people who worked hard to put the evening together, and especially to our sponsor, Veritext.

Michelle Cohen is Director of Human Resources at Schneck Law Group, LLC in Livingston.

Form 8300 - Are You in Compliance?

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is a violation of the attorney-client privilege, the IRS contends that Form 8300 payment disclosures, regarding legal fees, does not represent a confidential communication between lawyer and client in the nature of legal advice. Therefore, the details of such a transaction are not protected by the attorney-client privilege. Attorneys may be forced into an untenable position of choosing between the possible violation of state bar association ethical principles and/or the risk of penalties for noncompliance with IRS reporting requirements.

New Jersey's Rules of Professional Conduct provide some guidance, under RPC 1.6(d)(4), indicating that client information, reportable on Form 8300, could be provided to the IRS without violating the attorney-client privilege. "A lawyer may reveal such information to the extent the lawyer reasonably believes necessary.....to comply with other laws."

As part of the on-going effort to enforce Form 8300 compliance by attorneys, the IRS has taken the position that it will seek to assess the intentional disregard penalty against certain attorneys that either fail to file and/or file an incomplete form. The IRS has commenced performing audits at law firms to test compliance with the Form 8300 reporting requirements and has assessed penalties for noncompliance.

Kenneth E. Winslow, CPA is Partner at Bederson LLP in West Orange. Ken can be reached at 973-530-9115 or by email at kewinslow@bederson.com.



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BY MARY ELLEN DOLAN AND LOUISE RUFFO



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Presenting our Business Partners

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OR IF YOU WANT TO BE PART
OF AN NJALA COMMITTEE,
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COMMITTEE CHAIR (Below)
OR BOARD MEMBER (See Page 3).
WE WOULD LOVE TO HEAR FROM YOU!**

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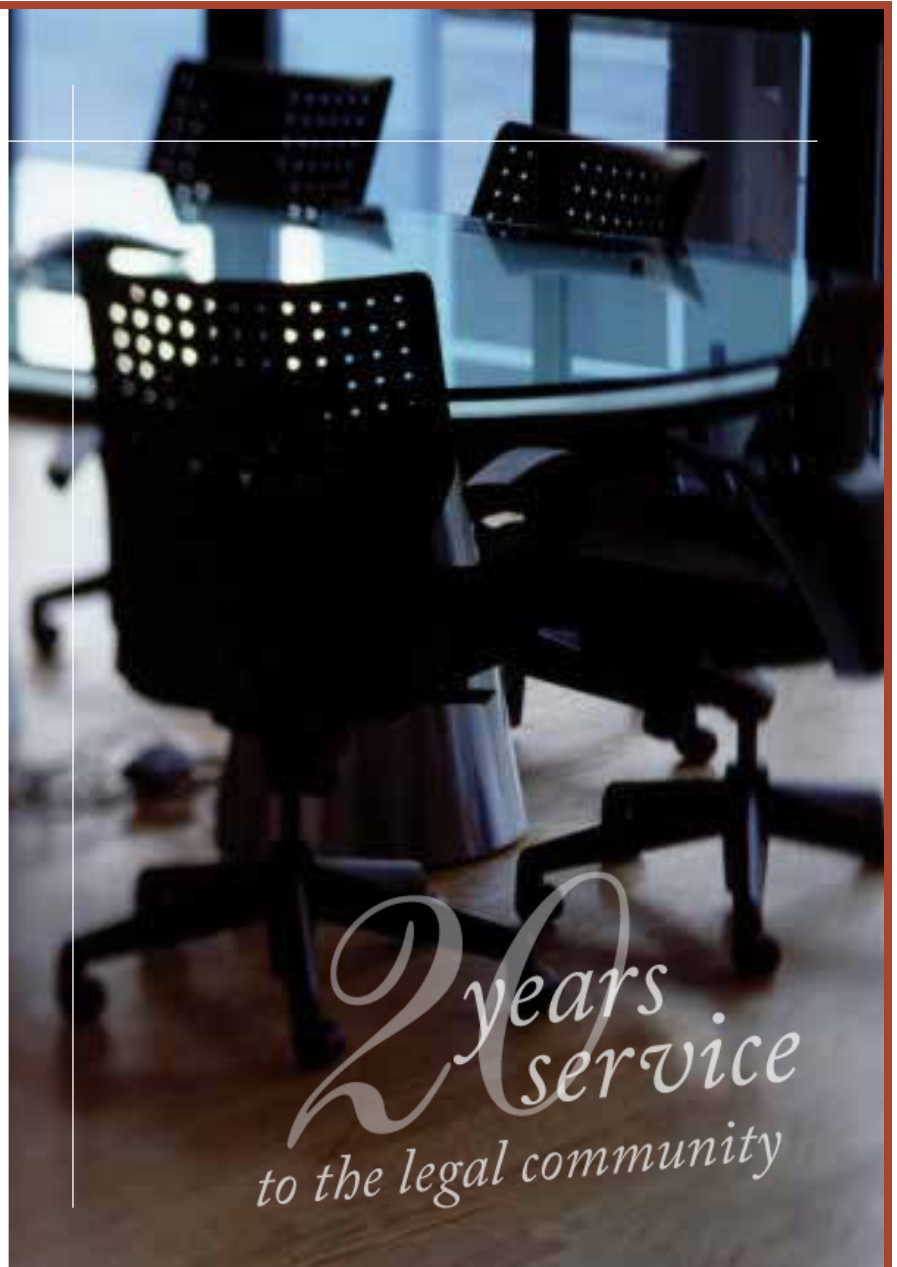
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