

## PRESIDENT'S MESSAGE

By Karen Lemmon, JD, CLM



As I look back on my years of membership in ALA, I am struck by the number of people I have met who have impacted my career and my life. Many of these people I now

consider friends, not just professional colleagues. They have led me from someone who knew little about legal management to a Certified Legal Manager professional.

My path to becoming a legal administrator is a bit unconventional. I began my legal career as a paralegal. After a number of years, and a couple of career changes, I made the decision to attend law school. During law school, I found that although I enjoyed being in the legal environment, the practice of law wasn't what I expected it to be. I finished law school, but at the time did not expect to practice law. I wasn't sure what I would do instead though, so I worked at my first firm as a law clerk doing corporate and business work.

Fast forward five years, when the office manager at the firm decided it was time to retire. My managing partner, knowing that I was looking for an alternate path, asked me if I would be interested in taking over as Firm Administrator. She knew that with my JD, I was more than an office manager, and she empowered me to broaden my horizons and take on more duties than the previous office manager had done.

I found that I very much enjoyed legal management because it allowed me to use my organizational, problem-solving, logistics, business, and people skills. Unfortunately in 2009, as did many in the legal field, I was laid off during the recession. Because of my membership in ALA, I was able to secure another position after only three months. In my new position, I continued my ALA membership despite my firm not being supportive, and attended conferences at my own expense. I found that the more I attended ALA events, the more I learned and the more I became empowered. I enjoyed the fellowship and camaraderie, and very much appreciated the mentorship and advice of my fellow ALA members.

Several years later, I was able, due to my friends and colleagues in ALA, find a new position at Higgs Fletcher and Mack. In the meanwhile, I had been studying to take the CLM exam. I spent about a year and a half studying and preparing for the exam on my lunch hours. I passed the CLM exam on my first try in November 2017, and now am one of 8 CLMs in San Diego and 390 in the US to achieve this certification.

Which leads me to my initiatives. My theme this year is "Rise Up With ALA."

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*"They key is not spending time, but investing in it."*

*- Stephen Covey*



# THE MANDATE



My first initiative is to Rise Up in your professional career. Education is key. Our chapter offers many educational opportunities, and I would implore you to take advantage of them. Stephen is planning some great education sessions this year. Also consider taking the CLM exam. CLM chapter members are available and willing to offer guidance and advice. The Chapter has purchased a copy of the new study guide published by ALA which should be a great study resource for any members who would like to check it out.

My second initiative is to Rise Up in your community. The Chapter has a non-profit foundation called the San Diego Legal Administrators Foundation. The Foundation will once again sponsor Couture for a Cause to benefit Voices for Children and Star/PAL. If you haven't participated in chapter fundraisers in the past, consider doing so this year. In addition, the national Foundation of the Association of Legal Administrators is in the beginning phases of implementing a program called Administrative Pro Bono to have ALA members volunteer to work with legal assistance programs such as Legal Aid, Casa Cornelia and other groups in their service to the community. Our Chapter will be supporting this program. We have so many things to offer, and should share our knowledge and skills to help those in need.



**Rise Up with ALA!**

**The ALA Job Bank is a great place to post for talented managers and staff!**

**For more information and to submit job postings,  
please contact:**

STEPHEN WILLIAMSON  
(858) 314-2770  
[SDWilliamson@mintz.com](mailto:SDWilliamson@mintz.com)

**Or visit the San Diego ALA website to see what's new!**

**<http://www.sandiegoala.org/category/jobs/>**



## **Gain more from your membership and get involved in 2018!**

Dear Chapter Members:

Do you want more out of your membership? Would you like to network with like minds? How many times have you been faced with an issue where "no one else understands" and you could use a group of peers to consult?

Then take the opportunity to get involved in the SD Chapter in whatever capacity you are comfortable.

Let's work together to make our Chapter the best it can be!

All my best,

Karen Lemmon, JD, CLM  
President 2018-2019

**Take advantage of the  
resources at  
[SANDIEGOALA.ORG](http://SANDIEGOALA.ORG), and  
stay Connected with ALA!**





## 5 Steps for You to Help Manage Law Firm Culture and Create a Succession Plan

By: Dan Negroni

After an amazing 4-city tour of the East Coast Association of Legal Administrators (ALA) Chapters and enjoying great people, great conversation, and great debate, I got to thinking... What was the number one challenge that affected all these amazing and caring law firm administrators?

Well, it didn't take long to see a pattern. Very quickly, I saw the challenges these administrators have to balance. On one side, the administrators have their partners coming to them asking (1) how do I deal with whiny millennials, how do I not repeat the same instruction over and over again, how can I teach people that don't seem to care, and how do I teach motivation and work ethic; while on the other side the millennials see their administrators struggles and ask (2) how do I explain to senior partners the world is different, we are more than individual contributors, no you cannot keep your own assistant on a 1 to 1 ratio, and yes you need to shift your mindset too.

What I learned is that all of these great minds desire the same thing, a positive change to create a better place to work (culture), increase engagement, and be provided with respect and assistance to create a great firm capable of achieving so much more! And the administrators \$100,000 question... how do I create "respect" for my opinion and "buy-in" on how to connect the different generations of employees and clients?

*I wanted to take time to address this question and share with you the five hacks you can use to win with the boss.*

### BE BOLD:

Your opinion matters a lot! Mostly, you are the lifeblood of the organization and most partners rely on you more and trust you more than they do each other. You solve all of their relationship challenges internally and sometimes externally. Be confident in that fact. They need you. The best employees respectfully challenge their bosses with great questions, alternative suggestions, and pragmatic approaches. If it's a challenge for you to be bold, then politely ask for permission to share your opinion and share with the partners why you think it is critical for the business that they listen to your opinion. It's possible the news is about an employee, or even worse, a client who wants to leave the firm and it's in the best interest for the partners to hear the news from you first so they can take action before the consequences become more severe. If they still don't want to listen and you've exhausted all of your options to do so, then maybe it's time you move on. You're a valuable part of the firm! Be somewhere where you have the ability to positively impact the firm and make a difference every single day.



## MAKE IT ABOUT THE MONEY:

Use the universal language, \$\$\$\$\$. Most senior managers and partners can be convinced of almost anything if it makes economic sense. Teach yourself how to speak in terms of ROI (return on investment). Be able to communicate the value of how your idea can potentially make the firm money, save it money, reduce a risk, or create a new opportunity. Or maybe you want to get more training, learn how to better bridge the generational gap, understand different organizational models, or have more work flexibility. If so, remember to share how your ideas affect the “dough”. You can also try to obtain metrics and statistics as support that can put a hard number to your idea to demonstrate how much money your idea will make/save by increasing retention, increasing engagement, and providing training on client service and client development. And finally, when you’re teaching your partners the need to change their perspective with different generations, refer to the ROI measures we just talked about and how the shift in mindset will provide real financial value for everyone in the firm. Happy employees = happy clients = more profitability!

## PRACTICE THE PLATINUM RULE:

The platinum rule is to treat everyone the way **THEY** want to be treated. Senior Partners need to understand that the world is different and that the next generation wants different things. And that’s not a good or a bad thing, it’s just different. So speak to them the way they want to be spoken to and teach the next generation how to speak to seniors the way the seniors want to be treated, and vice versa. We need to adopt the platinum rule as a society.

It seems like the problem is that we treat everyone how we want to be treated, not how **THEY** want to be treated. Additionally, and most importantly, everyone needs to understand that this is about the others they serve, not themselves. We call that the WIFThem (What’s In It For Them?) Mindset. To build better relationships, you have to communicate in a way that is relevant to your employee or client. If done well internally and externally, you can go back and reference rule two above and show how your opinion impacts the client and creates “mo’ money for them! By practicing the platinum rule, you can create a real legacy through everyone you touch... Are you game to try it?

## BECOME THE COACH; MASTER THE QUESTION:

In society and in the workplace, especially law firms, we need to learn how to communicate better. And here’s a big tip... We learn differently now! Technology has made information a lot more accessible but it has also given all of us the attention span of a group of gnats. There’s a lot out there that competes for our attention. As a result, a new methodology for learning new concepts has emerged and it’s called micro learning. Essentially, you learn a little, put it into practice, assess, learn from the results, and repeat the process again with either a new concept or adjusting the one you just learned. We like to call it something else... Coaching! Coaching is high performance, on-demand training for on-the-spot learning. Micro learning through coaching is how we teach new concepts best at launchbox. Also, coaching can be taught to anyone and it’s equally important that coaching is applied up the corporate ladder, as well as down it. If you can master coaching as a tool for your personal and professional life you’ll be much better off, I promise. Teach or share a new concept with

anyone, such as your kids, spouses, partners, friends, etc. and see how powerful of a tool it can be to not only improve engagement but improve relationships. In addition to teaching a concept, you must first master the power of the question. Before you can share a new concept you need to understand what it is the person you're coaching truly needs. If you ask great questions you will win with coaching in any direction, up, down, peer to peer. After all, it's attorneys that make a living from asking great questions and they should be super familiar with how to do so!

So go do it! Teach and train both sides how to practice these 5 rules if you want a kick ass culture. If you need help along the way, call or text me 858-344-5811. I dare you to care that much. I want to help you create impact for you, your firm, and the practice of law. I believe in you and I know you have the potential to make a real deal change!

## BE REAL & POSITIVE:

Being real, authentic and genuine is necessary with the next generation employee and client, and quite frankly, with all of us. Truth and honesty have been underutilized in our society. If we are honest and authentic in the right way we will win! As my Dad told me early on, "honesty that kills is still murder." So don't murder, but rather show care and provide value with your words. Communication that is given with the real deal perspective of providing value will always win. Most of all, remember the story you're telling cannot just be about you, you have to make your audience the hero of the story. And when possible, apply the platinum rule we talked about earlier. my favorite tool: positivity! I do not advocate Pollyannaish behavior but how about a good old-fashioned dose of opportunity and positivity. Anyone who is artful enough to frame communication in a way that demonstrates a growth versus a fixed mindset will always win.

With all of that said, take another look at the above tools and see if you can coach by framing issues, with permission, great question asking, and the platinum rule. You will win 100% of the time, I promise! Teach these tools universally at your firm and ensure your culture rewards the behavior you want and not the opposite nonsense you don't.



## MEMBERSHIP NEWS

### MEMBERSHIP REPORT

MAY/JUNE 2018

By Katya Adams

#### New Members

#### Prospective Members Cont.

Kristine Custodio  
Senior Paralegal/Business Development Director  
Butterfield Schechter LLP

Jennifer Anderson  
Office Administrator  
Hahn Loeser

Louie Perez  
Senior Legal Analyst  
Pillsbury Winthrop Shaw Pittman LLP

**Know someone who should be a member of ALA?**  
**Refer them to Katya and earn points toward great prizes!**



**For more information and to participate in the program,  
please contact:**

**KATYA ADAMS**  
(858) 246-8701  
[kadams@watkinsfirm.com](mailto:kadams@watkinsfirm.com)

**Or visit the San Diego ALA website to see what's new!**  
<http://www.sandiegoala.org/>



# BOARD & COMMITTEE CHAIRS

**We welcome our  
2018/2019 BOARD OF DIRECTORS!**

President	Karen Lemmon	619/236-1551
President Elect – Education/Job Bank	Stephen Williamson	858/314-2770
V.P. – Membership/Peer Connections	Katya Adams	858/246-8701
Treasurer	Katherine Rivette	858/755-3000
Secretary	Cynthia Barron	619/241-4814
Director - Business Partner Relations	Lauren Bloodworth	619/744-0864
Director - Bank Statement Auditor	Libby Worden	619/531-7000
Director at Large/MAAG	Jamie Vidovich	619/233-4100
Immediate Past President	Shailla Schaible	949/864-3400



**Our New 2018/2019 Board of Directors**



**Thank you to our 2017/2018 Board of Directors**



## And our 2018/2019 COMMITTEE CHAIRS/MEMBERS



**Leadership Retreat  
& Transition of Roles**

Academic Scholarship Chair	Monica Menzer	619/233-1155
Business Partner Relation Chair	Lauren Bloodworth	619/744-0864
Asst. to Business Partner Relation Chair	Laura Oakes	619-232-8486
Bylaws/Historian Chair	Patti Groff	619/233-4777
Chapter Audit Chair	Angela Landeros	619/699-8338
Communications Chair (MAAG)	Jamie Vidovich	619/233-4100
Community Service/Couture for a Cause	Lauren Bloodworth	619/744-0864
Couture for a Cause	Lauren Bloodworth	619/744-0864
Diversity Chair	Marina Field	619/233-8591
Education Chair	Stephen Williamson	858/314-2770
Employment Job Bank	Stephen Williamson	858/314-2770
Hospitality Chair/RSVPs/Badges	Kristen DeGroot	619/232-8151
Legal Resource Fair/Prof. Assoc. Liaison	Shaila Schaible	949/864-3400
Media and Public Relations Chair	Carol McCabe	619/209-3000
Meeting Coordinator	Monica Menzer	619/233-1155
Membership Chair	Katya Adams	858/246-8701
The Mandate Newsletter Editor-in-Chief	Monica Reisner	858/755-5666
Nominating Committee	Shaila Schaible	949/864-3400
Peer Connections Chair	Katya Adams	858/246-8701
Photographer	Linda Quindt	858/737-3047
President's Award	Shaila Schaible	949/864-3400
Salary Survey Chair	Jamie Vidovich	619/233-4100
Social Media	Marina Field	619/233-8591
Spirit of San Diego Award	Shaila Schaible	949/864-3400
WebMaster	Beverly Driscoll	619/699-4996



**Leadership Retreat – Introduction of Officers, Directors and Committee Chairs**



ASSOCIATION OF LEGAL ADMINISTRATORS  
SAN DIEGO CHAPTER

## **SAVE THE DATES**

Upcoming Monthly Membership Meetings  
RSVP: Kristen DeGroot at [kdegroot@wingertlaw.com](mailto:kdegroot@wingertlaw.com)

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**MAY 3-6 . . . ALA NATIONAL CONFERENCE**  
NATIONAL HARBOR, MD

**MAY MEMBERSHIP MEETING . . . MAY 15, 2018**  
12:00 – 1:15 P.M. DOUBLETREE BY HILTON – MISSION VALLEY

**ANNUAL CHAPTER DIVERSITY EVENT. . . JUNE 19, 2018**  
5:30 – 7:30 P.M. DOUBLETREE BY HILTON – MISSION VALLEY

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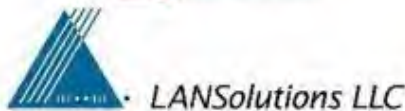
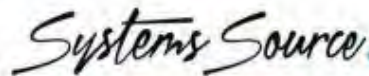




# THE MANDATE



## A SPECIAL THANKS TO OUR BUSINESS PARTNERS!



# THE MANDATE



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SPECIAL  
COUNSEL

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COURTYARD  
Marriott

WHAT YOU WANT  
WHERE YOU WANT

LOBBY

## NEW BUSINESS PARTNER DIRECTORY!

### 2018/2019 BUSINESS PARTNER SPONSORS

THANKS FOR YOUR SUPPORT!

Please check the Chapter's Business Partner Directory *first* when you're shopping for a product or service for your firm. Not only are our Business Partners committed to delivering the highest quality products and services, they are also committed to furthering the goals of ALA San Diego by providing the funding we need for the outstanding educational and networking events and scholarship opportunities we value as members.



Stay Connected with ALA!

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[www.alanet.org](http://www.alanet.org)

Your connection  
to knowledge, resources and networking



## HEALTH & WELLNESS

**It's no secret that maintaining your health is very important.  
Don't forget to take some time for yourself and protect your most valuable asset –  
YOU!**

➤ *Plan Ahead*

Check your calendar a week ahead, make a to-do list and be sure to pencil in time for workouts and relaxation – your stress level will thank you.

➤ *Meal Prep For The Week On Weekends*

Shop for the week on Saturday, cook and pack it up on Sunday afternoons while you listen to music and dance around your kitchen.

➤ *Drink More Water, Increase Protein And Reduce Processed Foods In Your Diet*

This is a fast and simple way to increase your energy and improve your health.

➤ *Embrace The Crock-Pot*

For everything from breakfast to desert, the Crock-Pot saves time and dishes.

**Smile! It's Good For You!**



The Mandate E-Newsletter questions?  
Interested in advertising? Want to  
contribute an article?

Please contact:  
Monica Reisner, Editor  
[mreisner@daleyheft.com](mailto:mreisner@daleyheft.com)

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P.O. Box 12809 | San Diego, CA 92112  
[info@sandiegoala.org](mailto:info@sandiegoala.org)

### **Editor's Corner**

*Did you know?*

Water can boil and freeze  
at the same time?  
It is called triple point.