

## PRESIDENT'S MESSAGE

By Stephen Williamson



Now that Autumn is beginning, it's a new chapter in the great year we've had so far. Hopefully you've all had some time to rest and recharge over the summer, which will help provide new energy to focus on closing this year out strong.

A few months ago, I explained my *why* – for why I participate in ALA – and heading into a new season is exactly the time to reinvest in being an engaged Member and recalibrate in some key areas. Value can be a subjective concept, sometimes it can be difficult to gauge benefit, especially when the return on an investment is not readily apparent. But something that has objective value is meaningful participation: the sharing and receiving of careers worth of knowledge. It's why when we poll the Membership the resounding response to where value can be found is always in our roundtables. Where you can network with your peers and gain insight into new and innovative methods or emerging technologies. It's why we instituted the Flash Roundtables before every educational meeting. So that you can always be both the student and the teacher and take some time to drive your own learning.

Another way of increasing the value of your membership is to completely engage the full scope of what our business partners have to offer. Specifically, meet with the ones who do not have direct relevancy to your immediate needs. The number of times one of our business partners, who I had not professionally engaged, helped to solve an issue I was experiencing has been countless. Those who support our organization are our partners – not a means to an end – so treat them as such! Network and get to know them as people, learn about their business. We partner with the best. Just because you might not be able to use them doesn't mean you, or a colleague, won't in the future. So reach out to them, I assure you it'll be worth it.

The next few months are going to be exciting. We have our Business Partner Appreciation event at Crowne Plaza coming up, as well as our Managing Partner lunch next month – both of which promise inspiring speakers. But first, on September 12<sup>th</sup> ALA's 12<sup>th</sup> Annual Couture for a Cause event will be at the Natural History Museum in Balboa Park, for which we've already exceeded last years' sponsorships. So grab your friends and family, colleagues and business partners, and join us as we have a glamorous evening of fun and fashion as we raise both money and awareness for STAR/PAL and Voices for Children. I'll see you there!

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September/October 2019



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**"Alone we are Smart,  
Together we are Brilliant."**

- Steven Anderson



**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:**

KATYA ADAMS  
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[kadams@watkinsfirm.com](mailto:kadams@watkinsfirm.com)

**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 2019!**

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!

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





## 5 Reasons Your Timekeeping Solution is a Liability + What To Do About It

By Gaby Isturiz

Have you evaluated the impact of your firm's time entry solution on your firm? If not, you may want to give it some consideration.

It's tempting to approach a timekeeping solution as an afterthought. After all, many vendors offering time entry solutions take this approach (free solution with no support, anyone?). This would be perfectly fine if timekeeping were inconsequential for firms, but the opposite is true: timecards are the units of revenue for law firms and should be at the forefront of any law firm's strategy.

Your time entry solution and its relationship to timekeeping behavior has a considerable impact on the financial performance of the firm. Therefore, law firms should be obsessed with creating the highest quality of timecard inventory. One of the ways to address this is by eliminating liabilities that compromise your ability to create accurate and compliant time cards. Let's explore the ways in which your timekeeping solution could be a liability for your firm, and what you can do about it:

**#1: Poor user experience, based on what the vendor thinks, rather than what the timekeeper needs.**

How many times have you heard from attorneys "I hate entering time" or "technology is not my thing." Many of today's time entry solutions on the market were built based on the priorities and convenience of the vendor, rather than the needs of the end user, claiming to do "everything." This results in overly complex solutions that are a hassle for end users to learn and use. Inevitably, users resist these technologies because they do not deliver on the simple expectation of allowing them to keep track of their time in the simplest, most convenient way possible. When end users are not engaged, it leads to inaccurate time entries, issues with billing compliance, rejections, delays in payment, wasted staff resources and more. All of these things cost the firm money.

**Solution:** As consumers of technology (i.e., LinkedIn, Netflix, Spotify, Amazon), we look for simplicity and the ability to perform a function (i.e., network, watch a movie, listen to music, buy something), regardless of physical location and the device in our hands. Timekeeping demands the same experience. Be sure to understand the needs of the timekeepers at your firm and select a time entry solution that was designed to work the way lawyers work: at any time, at any place and using any device. Time entry must be simple, it should not be a burden.

**#2: Obsolete on day one, and costly and time intensive to deploy and update.**

You are no stranger to the fact that there is a considerable cost and amount of time involved in upgrading or rolling out a time entry solution. To make matters more frustrating, most solutions are obsolete by the time they are deployed, despite all of the time, cost and effort expended to get it in place. For most firms, this means a never-ending cycle of deployments and upgrades.

Cont. on Pg. 4



**Solution:** If you haven't yet noticed, we live in an "As a Service" world. Music, shopping, television (and more!) is now consumed as a service. This means that you are removed from the burden of knowing how to make technology work for you. Choose a "time entry as a service" (SaaS) solution with a small amount of time to deploy that continually gives users the latest version of the product without saddling the firm with resource-intensive installation and maintenance.

### #3: Failure to innovate leaves you with

What is innovation? We define innovation as making something work better, rather than creating something new. As professionals, we are constantly changing the way that we work to improve productivity, align with our lifestyles (think of the mobile revolution), etc. Therefore, technology should be in a constant state of evolution. Despite this, many solutions on the market today have not rolled out any meaningful changes since they were launched and have no meaningful plans to improve their product. This is the most blatant disregard for their customers.

**Solution:** Hold your vendor accountable for innovating to meet the needs of your users. Everyone wants and says they innovate, however, that doesn't mean it is really happening. What positive change are they creating? Does it really work and at what cost? Take a look at your vendor's roadmap, their ability to deliver and how soon you can get those innovations in your hands. The roadmap should contain an aggressive schedule with meaningful improvements connected to the needs of your firm.

### #4: Leaving your firm with massive security vulnerabilities.

Today's legacy software solutions contain several security vulnerabilities, due to storing data on devices, replicating data in many places and other security concerns. Knowing

that law firms are lucrative targets for cybercriminals, many clients are increasing scrutiny of firms' security practices through Outside Counsel Guidelines.

**Solution:** Work with a vendor that is committed to developing solutions that are secure from day one, following the advanced security standards. Avoid "frankenstein technology" that needs to be constantly patched in an attempt to adhere to the ever-changing security threats.

### #5: Lack of compliance with client rules.

The last decade has been transformative for law firms due to clients putting more pressure on compliance and cost reduction. Long gone are the days that paper bills are presented and paid without scrutiny. With over 80% of medium to large legal departments implementing ebilling and legal expense management solutions, law firms are expected to comply with their guidelines or otherwise be subject to reductions and write-offs.

Don't dismiss reductions and rejections as a "cost of doing business" due to the firm's time and resources. You did the work, and you should be paid for it.

**Solution:** Time, as it is entered, should immediately comply with any client guidelines. Choose a solution that allows you to comply at the point of time entry and can help your firm to embrace and manage outside counsel guidelines.

Choosing a time entry solution for your firm is an important decision that is directly tied to revenue. Therefore, it is important to evaluate whether your current solution truly meets the needs of your firm today and if it will continue to evolve to meet tomorrow's demands.

*Gabriela Isturiz, founder and president of [Bellefield Systems](#) and the creator of [eBillingHub](#) (now part of Thomson Reuters)*



## MEMBERSHIP NEWS

### MEMBERSHIP REPORT SEPTEMBER/OCTOBER 2019

By Cynthia Barron,  
Vice-President/Membership Chair

Current National Members: 71

Current Chapter Members: 71

#### New Members

#### Prospective Members

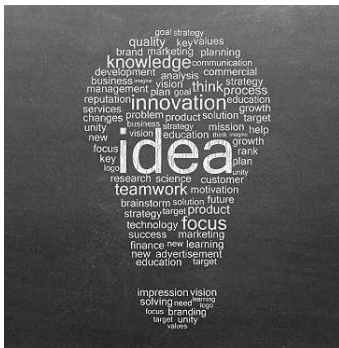
Rose Sheehan, Secretarial Manager,  
**Morrison & Foerster**

Cynthia C. Reinbolt, Legal Administrator  
**Peterson & Price, APC**  
(recently joined National ALA member)

Christina Alvarez, HR Analyst  
**SD Superior Court**

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

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



#### CYNTHIA BARRON

(619) 241-4814

[cbarron@fitzgeraldknaier.com](mailto:cbarron@fitzgeraldknaier.com)

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

<http://www.sandiegoala.org/>

## BUSINESS PARTNER SPOTLIGHT



### AHERN INSURANCE BROKERAGE

**Tamara L. Bartels, CIC | Vice President | AHern Insurance Brokerage**

9655 Granite Ridge Drive, Suite 500, San Diego, CA 92123 | Phone: (858) 514-7105

[www.AHERNinsurance.com](http://www.AHERNinsurance.com)

AHERN Vice President, Tamara (Tami) Bartels, is an industry veteran having worked in the insurance industry for over 26 years, specializing in the risks of law offices for the past 18 years.

In her role with AHERN, Tami is responsible for new and renewal business development. She provides clients with the transfer of risk in all exposures: professional liability, employment practices, workers' compensation, fiduciary, crime, cyber/privacy, general liability, property and automobile coverage.

Tami holds the designations of Certified Insurance Counselor. She actively supports the Association of Legal Administrators and has provided educational classes on the local level for the Certified Legal Managers designation. In addition, Tami has provided the services of Expert Witness/Consultant for workers' compensation and crime/fidelity coverage.

Tami is a graduate of Point Loma Nazarene University with a Bachelor's Degree in Business Administration.

AHERN is considered an industry leader within the legal insurance arena. As part of one of the top 10 insurance brokerages in the world, Acisure LLC, we are nationwide in our presence and are endorsed by five major bar associations including the San Diego County Bar Association. Together we insure over 7,500 law firm clients, ranging in size from small and solo firms, to firms as large as 1,100 attorneys.

#### AHERN's Insurance Product Offerings

◆ Professional Liability (Errors and Omissions)	◆ Employee Benefits
◆ Management Liability / Directors & Officers	◆ Short-Term, Long Term & Partner Disability
◆ Employment Practices Liability	◆ HR Support
◆ Workers' Compensation	◆ Employee Assistance Programs (EAPs)
◆ PEO and Payroll Services	◆ COBRA, FSA and Section 125 Plan Administration
◆ General Liability / Property	◆ Key Person Life Insurance
◆ Fiduciary / Crime / Kidnap & Ransom / Cyber	◆ Employee Concierge Programs
◆ High Net-Worth Insurance	◆ ACA Compliance Services

As you can see, AHERN can have your firm covered with each line of insurance handled by an expert who specializes in working solely with the legal industry and all the unique coverage concerns that may come to light.

We currently have access to over 40 different insurance companies, several of which offer exclusive programs that your current broker does not have access to. We can provide a quote quickly and without interfering with your current brokers' efforts.

For more information about AHERN, or to fill out an online application for a premium indication, please visit us online at [www.aherninsurance.com](http://www.aherninsurance.com).

Please feel free to contact me at (858) 514-7105 or via email at [tbartels@aherninsurance.com](mailto:tbartels@aherninsurance.com) if there is anything that I or my team can assist you with throughout the year!

#### ALA Member Discounts Offered:

Lawyers Professional Liability premium discounts of up to 20% are available for San Diego County Bar Association members through AHERN's exclusive Lawyers Professional Liability program with AXA XL.



# BUSINESS PARTNER SPOTLIGHT

## RICOH

### SILVER SAND CASTLE BUSINESS PARTNER SPOTLIGHT



#### Albert Fagins—Regional Legal Consultant

Albert Fagins has over thirty years of industry experience. In 1985, while attending school he began his career at an IKON Dealership and has remained with IKON (now Ricoh) for his entire 34-year career. Albert has held many sales and managerial positions within the organization, calling on all types of industries and customers varying in size and scope. Over the past 8 years Al has worked exclusively in the legal sector. As an Area Legal Specialist, Al works closely with his legal customers to design and implement solutions that address the document and operational challenges that legal customers face throughout locations on the west coast. Al is married with three children and absolutely loves to play golf!



#### Andrew Spett—eDiscovery Consultant

Andrew is a Senior E-Discovery Consultant with Ricoh, USA. A member in good standing of the State Bar of California, Andrew began his legal career in the Insurance Defense and Construction Defect groups at a mid-sized law firm in San Francisco. With 13 years of experience in eDiscovery, and 20+ years total in the legal vertical, Andrew is dedicated to the task of building consultative business relationships through education, analysis, collaboration, and execution. He has been involved professionally with many complex litigations and fraud investigations utilizing advanced search technologies.



#### Grace Peterson—Legal Account Specialist

Grace has over 15 years supporting law firms and corporations with discovery services, both paper discovery and eDiscovery. Also, supporting organizations with their digital transformation (paper documents to digital formats). Passionate about providing clients with a high level of customer service and integrity. Grace is also an avid traveler and spends several hours per week caring for her garden at home.



#### Michael Ubaldini—Director of Legal IT Services

Michael Ubaldini brings 20 years' IT strategy and consulting expertise to his role as Director, Legal Services, mindSHIFT Technologies, Inc. (a Ricoh company). Michael's primary responsibility is to help law firm executives implement reliable and secure business technology solutions ranging from managed IT and cloud services to complex system migrations, upgrades and other comprehensive IT projects. Additionally, Michael serves as a volunteer member of Big Brothers Big Sisters and Phoenix Area Parks & Recreation Park Steward Program. Michael was also the Co-Founder and Board of Directors member for nonprofit organization, NixCancer Foundation. Michael is an avid runner and competes in several marathons year-round.

Ricoh has been a powerful partner in the legal industry for more than two decades. Our dedicated teams of professionals understand the unique requirements of the legal industry. Let us provide the comprehensive Facilities Management, eDiscovery and IT solutions you need so that you can concentrate on what you do best: winning cases.

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ASSOCIATION OF LEGAL ADMINISTRATORS  
SAN DIEGO CHAPTER

**SAVE THE DATES**

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

**BOARD MEETING. . . SEPTEMBER 10, 2019**  
THE GUILD HOTEL 12:00 – 1:30

***COUTURE FOR A CAUSE. . . SEPTEMBER 12, 2019***  
6:00-9:00 P.M. – NATURAL HISTORY MUSEUM  
1788 EL PRADO, SAN DIEGO

**BUSINESS PARTNER APPRECIATION LUNCHEON. . . SEPTEMBER 17, 2019**  
11:45 -1:15 – CROWNE PLAZA – MISSION VALLEY  
2270 HOTEL CIRCLE N., SAN DIEGO

**BOARD MEETING...OCTOBER 8, 2019**  
THE GUILD HOTEL 12:00 – 1:30

**MANAGING PARTNER LUNCHEON. . . OCTOBER 15, 2019**  
11:45 -1:15 - HILTON GASLAMP  
401 K STREET, SAN DIEGO

**FALL LEGAL MANAGEMENT CONFERENCE. . . OCTOBER 21, 2019**  
October 21-23, 2019 – Seattle, Washington

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Buy your tickets online for Couture for a Cause [www.coutureforacause-sd.org](http://www.coutureforacause-sd.org)

Remember – There are still sponsorship opportunities.  
Talk to your partners and be a part of a fantastic event for charity.



# *12<sup>th</sup> Annual* **COUTURE** *for a cause*

San Diego Legal Professionals Unite  
to Support Children in Need

*Benefiting*



**Thursday, September 12, 2019**

**Starting at 6:00 PM**

**Natural History Museum**

Single Ticket: \$55

8-Ticket Bundle: \$400

Door Price: \$65



**PRESENTED BY**



**WOMEN IN eDISCOVERY™**  
WOMEN. EMPOWERING WOMEN.



[Click here for Tickets & Sponsorship Opportunities](#)

## A SPECIAL THANKS TO OUR BUSINESS PARTNERS

Click [HERE](#) for the 2019 Business Partner Directory

### Golden Sunset



Legal Staffing • Project Management • Attorney Search

### Silver Sand Castle



### Bronze Boogie Board



## A SPECIAL THANKS TO OUR BUSINESS PARTNERS

### Catch the Wave



### Surf's Up



### In-Kind Sponsors





## HEALTH & WELLNESS

### FIVE EMPLOYEE WELLNESS IDEAS TO HELP YOU ATTRACT TOP TALENT

The connection between engagement and performance is well-established. Engaged teams have been shown to outperform competitors in categories like productivity, profit, and employee retention.

Employee wellness also impacts the bottom line more directly. Harvard Business Review reported that, on average, employers who invested in health and wellness initiatives saw \$6 in healthcare savings for every dollar invested. The Rand Corporation estimated that the ROI for businesses overall was \$1.50 for every dollar spent; the ROI for disease management jumped to \$3.80 for every dollar invested.

So here are some employee wellness ideas that will get your team members excited, make a positive impact on their health, and help you develop a more engaged team.

1. **Provide Healthy Office Snacks**
2. **Get Your Team on Their Feet - Offering standing desks is a good start**
3. **Workplace Step Competition – Give out Pedometers and Gift Cards for participants & winners**
4. **Host a Cooking Class**
5. **Bring the Outdoors Inside – More greenspace is always good**

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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[info@sandiegoala.org](mailto:info@sandiegoala.org)

### Editor's Corner

#### **WEIRD AND TRUE FACTS – WHOA!**

Oxford University Was Founded Before  
Aztec Civilization Began

Neil Armstrong Had to Go Through U.S.  
Customs after Returning from the Moon

Saudi Arabia Imports Camels from Australia

MLK Jr., Anne Frank, and Barbara Walters  
Were Born in the Same Year