

## PRESIDENT'S MESSAGE

By Stephen Williamson



Happy New Year! I hope everyone was able to enjoy some well-deserved time off with family and friends. I myself rang in the New Year by winning a dance competition. I managed to perform the best *sprinkler* to quite the captivated audience. I was also sober, at the time. And, if you're wondering, no I will not recreate this incredible life moment.

With a new year comes new and exciting opportunities to get the most out of your membership:

On January 23, we will be hosting a Member Social Honoring Past Chapter Presidents (this event is open to all members – not just former Chapter Presidents). It will be held at the Hilton Gaslamp from 5:00 pm – 7:00 pm. I'd love to see everyone there!

On January 30, Golden Gate Chapter is holding their Knowledge to Leadership Conference and Exposition in San Francisco. K2L is a one-day educational conference for ALA members which will include 3 keynote speakers and 9 breakout sessions. Registration for the conference can be found [here](#).

## ISSUE LII

January/February 2020

On February 11, the Chapter will be hosting our annual Labor Law Update and Legal Resource Fair. This will be an incredible opportunity to educate yourself on all the new and relevant labor laws. It will also be a great opportunity to interact with all of our business partners who enable our Chapter to thrive. And don't even get me started on all the cocktails, free swag and raffle prizes.

And of course, ALA's National Conference will be held in beautiful Salt Lake City, UT (I've never been, I'm assuming it's beautiful as an optimist) on May 3<sup>rd</sup> – 6<sup>th</sup>. Registration is currently open for Early Bird rates through February 14<sup>th</sup>.

And, what may be the most exciting event – Katya Adams will be taking over as your 2020 – 2021 Chapter President. We've all followed and cheered her meteoric rise to the top and now we'll really get to see her in action. I, for one, am looking forward to be put out to pasture.

There is so much more we have in store this year and I promise that it will be rewarding, both personally and professionally, should you choose to engage and get the most out of everything we have to offer.

I wish everyone a joyous and prosperous 2020.



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*“Cheers to a new year and another chance for us to get it right.”*

– Oprah Winfrey



**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  
(858) 246-8701  
[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 2020!**

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!**





## Resolve To Mitigate Technology Risk In The New Year

By Jerry Gregg – ONE LEGAL

There's something about the first days of a year that encourage us to set personal goals and make plans to keep them. But when you sit down and draw up a list of resolutions for yourself, why not take a moment and make a few for your firm and team?

This year, resolve to mitigate digital technology and online support solutions risk in your office with this effective five-step process.

### 1. Inventory your tools and digital service providers

The busy legal professionals in your firm rely on numerous digital tools and resources throughout the day. Everything from desktop software, communication and messaging tools, online litigation support portals, and more.

From my experience, this is the number one area where overlap, duplication of services, and gaps in security can be quickly identified and corrected. Do you have different versions of PDF preparation software or internal message boards competing for your team's attention? Are you using all the services your key vendors provide? Is there outdated freeware still circulating the office and slowing your team's overall performance with unnecessary workflow steps?

Get started with a firmwide survey and ask everyone to list the tools and software they use regularly. Remind them to also include mobile devices and any communication tools they are using to connect office to courtroom.

Then take a critical look at all the tools and systems you find, as if you were a new employee yourself and just getting started at the firm. Do they foster cooperative workflows between different teams? Do they seem easy to learn and use? Or do they require a thick training manual, a tutorial, and ongoing mentoring to master?

### 2. Next: vet your support network

Once you've identified the main set of tools and resources your firm currently uses, review the customer support resources for each of them. Again, you should approach this from your team's perspective as daily users of the tool. If you were to require assistance in the middle of a task, how easy would it be to get the help you need? Look for a robust support center with easy to navigate topics and FAQs as well as personal customer support via phone and email. Each tool's support resources should be intuitive, thorough, and easy to locate.

Also ensure that these tools are fully licensed for all users and are compliant with all laws and regulations, such as the California Consumer Privacy Act.

This is also the time to review the billing and account administration settings of any subscription or software-as-a-service used by your firm. Look for features that will aid your accounting team with client billing, flexible payment options, multiple-user permissions levels, and other administrative tasks.

Did you know that you might be able to have some of your vendors do this research work for you? Schedule discussions and demonstrations of their services. Your initial review will help you ask direct, valuable questions, and you might also learn about new or under-used features that can help your team.

Cont. on pg. 4

### 3. Out with the old

Now that your online tool inventory and review of support materials is complete, you should be able to easily identify obvious areas of risk. Prime suspects will be old technology that is no longer supported or updated, different software or applications used for the same purpose by different teams in your firm, free-ware, personal software, or expired trial packages installed by departed employees, software not industry-rated or commonly known, and any software that is just not meeting your firm's standards for privacy and security.

Work with your IT team to plan uninstallation of all instances of unwanted software and remove any related older manuals or training materials. Establish firmwide guidelines on the tools to use going forward, including any needed policies on downloads and third-party freeware.

### 4. In with the new

As you get ready to say goodbye to outdated tools, you also need a plan to introduce your team to the preferred tools and providers you've chosen to keep. This communication plan should encompass required training and clear, consistent messaging of the importance of adopting firmwide technology.

The best way I've seen firms do this is to start the discussion on new technology as early as possible. You may also want to enlist the support of team-leads in key departments. Their participation can be valuable in the survey and tool review steps, and they can be your street team to help make sure everyone follows the new rules going forward.

Another useful resource is scheduling user-training sessions with your preferred vendors. Your vendor should be able to provide regular training to new team-members and

demonstrations on new features. They should also be willing to provide this training in the format that works best for you, such as live sessions, webinars, or available online resources.

Finally, schedule a check-in with key stakeholders on the team in the next quarter and make it a reoccurring meeting either quarterly or annually. Honest user experience and feedback will continue to inform your technology decisions, so having a regular channel to hear it will become important. Below are some of Adams & Martin Group's biggest do's and don'ts for attracting top talent, maintaining a positive employer brand, and creating a memorable candidate experience.

### 5. Same time next year?

If this was your first office technology review and overhaul, you've just done a lot of needed work. No one on the team is going to be eager to do it all again in one year's time. The good news is that they won't. If you've done it right, you've set up strong guidelines for user best-practices as well as future technology decision-making. You can also take this year to draw up a plan that approaches this project in scalable phases over the following months, with goals set for each quarter and year's end.

However you choose to do it, I encourage you to keep your resolution to take the steps that will mitigate risk in your office technology. You'll find that it is a great way to start your firm's new year (and decade!) in 2020.

*With 25 years of operational and fulfillment experience in the San Diego legal industry, Jerry Gregg delivers local knowledge and practical solutions to solve customers' problems. Contact Jerry at [jgregg@onelegal.com](mailto:jgregg@onelegal.com).*





## MEMBERSHIP NEWS

### MEMBERSHIP REPORT JANUARY/FEBRUARY 2020

By Cynthia Barron,  
Vice-President/Membership Chair

Current National Members: 73

Current Chapter Members: 73

#### New Members

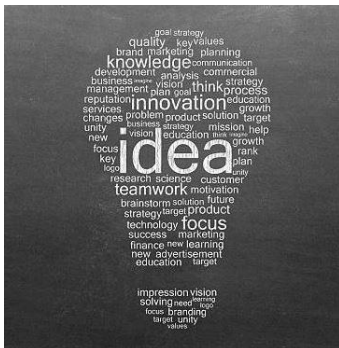
#### Prospective Members

**Vira Villareal**

Director of Operations, For Purpose Law Group

**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

THANK YOU 2019 BUSINESS PARTNERS FOR YOUR SUPPORT!

On behalf of the Chapter, we would like to extend our sincerest appreciation to all of our Business Partners who contribute greatly to the success of our Chapter and its members. Without your support we would be unable to provide many of the speakers, social events and scholarships that enhance our experiences as members of ALA San Diego. We value your friendship, knowledge and financial support.

We are currently working on finalizing our 2020 Business Partner program and are looking forward to an exciting and fun year! We have some great new events and meetings in the works and we look forward to continuing to build relationships between our business partners and members.

Please visit the Business Partner Opportunities page:  
<https://www.sandiegoala.org/category/partnerships/>

Or contact our Director of Business Partner Relations:

Lauren Bloodworth  
[lauren.bloodworth@kts-law.com](mailto:lauren.bloodworth@kts-law.com)  
(619) 744-0864

## BUSINESS PARTNER SPOTLIGHT

### ROBERT HALF LEGAL



Nicole Riccitelli is the branch director for Robert Half Legal, the premier provider of highly skilled legal professionals, including lawyers, paralegals and legal support personnel, for law firms and corporate legal departments. Nicole oversees the legal staffing, recruitment and business development operations throughout the San Diego area. She joined the company in 2017 and has held various leadership roles since that time. Nicole received her bachelor's degree from University of California—Irvine and her juris doctor from Whittier Law School. She is also involved with the Voices for Children organization where she is a court-appointed special advocate (CASA) for adopted, foster and neglected children.

Robert Half Legal has enjoyed a long-standing partnership with the Association of Legal Administrators (ALA). We have worked closely with the San Diego chapter for more than 10 years. And as a business partner of ALA, we have formed great relationships with many members across the country. As a result, we have built a strong customer base and have expanded our visibility among loyal ALA members. They call upon us for their legal staffing needs and we aim to serve as a resource for information on legal hiring trends – both locally and nationally. Finally, ALA is a tremendous resource for the legal community. As a legal staffing firm, our goal is to provide our clients with immediate access to highly skilled legal talent and our partnership with the ALA allows us the opportunity to meet top-shelf legal administrators who help us to achieve that goal.

For more information, please visit: [www.roberthalf.com/legal](http://www.roberthalf.com/legal) or contact the San Diego team: (619) 234-3181.



## BUSINESS PARTNER SPOTLIGHT



### Adams & Martin Group is the leader in San Diego legal recruiting.

**Adams & Martin Group** is a values-driven, full-service legal staffing firm that has proudly served the staffing needs of law firms and legal departments in greater San Diego since 2013.

Our local team – including our Vice President – lives and works right here in the San Diego community, with strong ties to the area's professional organizations. With our company headquartered in Southern California and two additional offices in the region, we know this unique labor market inside and out. Adams & Martin Group is your go-to resource for all legal recruitment needs.

We are proud to support ALA in its continuing efforts to develop, strengthen, and advance the legal administration profession. Dedicated to creating remarkable experiences, your Adams & Martin Group team is passionately committed to our firm's purpose: *To make life better for the people we serve.*®

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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)

**JANUARY MEMBERSHIP MEETING. . . JANUARY 14, 2020**

THE WESTGATE HOTEL 11:45 – 1:00  
AMBASSADOR ROOM, 3<sup>RD</sup> FLOOR  
1055 SECOND AVENUE, SAN DIEGO

**MEMBER SOCIAL – JANUARY 23, 2020**

THE GUILD HOTEL 5:00 P.M. - 7:00 P.M.  
500 W BROADWAY, SAN DIEGO, CA 92101

**LABOR LAW UPDATE & LEGAL RESOURCE FAIR...FEBRUARY 11, 2020**

DOUBLETREE MISSION VALLEY 11:45 – 5:00  
7450 HAZARD CENTER DRIVE, SAN DIEGO

11:45 pm – 12:00 pm – Registration

12:00 pm – 1:00 pm – Buffet Luncheon & Chapter Business

1:00 pm – 3:00 pm – Labor Law & Employment Update

3:00 pm – 5:00 pm – Legal Resource Fair \*

Happy Hour & Networking with Business Partners

**\*Drawing for Scholarship and \$400 travel reimbursement for  
ALA Annual Conference**

## 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



# THE MANDATE



## A SPECIAL THANKS TO OUR BUSINESS PARTNERS

### Catch the Wave



### Surf's Up



### In-Kind Sponsors





## HEALTH & WELLNESS

### SUSTAINABLE NEW YEAR'S RESOLUTIONS ARE QUANTIFIABLE GOALS

A common mistake people make is setting vague goals like, "I'll be healthier". Instead, make your resolution specific, with a tangible, achievable outcome.

Personally, I say put it on your calendar and make it a repeating event. I added "30 minutes Elliptical" to my calendar at 10:00 am on Mondays and Wednesdays and made it repeat for the year. It helps me plan my day and sends me reminders to keep me on track.

#### Eat Better

If you want to eat better in 2020, determine how you plan to do so with smaller and sustainable specific goals. For example, "eat at least two fruits a day", "limit soda intake to 1 can a day".

#### Exercise Regularly

If you want to be more active this coming year, a few examples of resolutions are "Take the stairs instead of the elevator", "go on a 30-minute walk every morning at 5:30 am".

#### How to Make Resolutions Stick

Whatever resolution you decide to make, one mistake that can throw resolutions off track is the all-or-nothing approach. If you happen to mess up, don't give up on your goal. See it as a temporary setback and keep moving forward. Every day that you eat healthily, get some exercise, and beat your bad habit, you're improving your health and well-being.

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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### Editor's Corner

When signing documents do not use the date abbreviation 20, for the year, as additional numbers can be added to the end, e.g. 3/1/20 could be turned into 3/1/2019 or 2021, etc.

Happy New Year Everyone!