



Future wiring...Planning has begun!

Presently, we have one wired courtroom for civil cases, (while, interestingly, Alberta has been wired for a decade). A small BC E-trial today involves you bringing in all of the equipment. Room layout is a significant challenge. You need to purchase equipment before you know what room you're in, as they're assigned shortly before the trial begins. Internet access is generally unavailable. It's also worth noting that in some trials even using your Blackberry to check for that important email is frowned upon. Perhaps along with the wiring of the courtrooms, we would also benefit from rewiring some misconceptions about technology and how we conduct business today. Because technology is here to stay.

If your case has been slated for an E-trial, what do you need to do?

The top 3 rules for a successful E-trial

Rule 1: Have a great game plan

Executed at the beginning of your case, not on the eve of trial, your plan should consider the full life cycle of the case. Gone are the days when you can wing it unless you have anything but a small case, with no deadlines in sight. Large cases require even more forethought and organization.

Here is a helpful tip: if you have a trial date plan backwards from the actual date, and you will soon realize how little time you really have. It's the nature of the business, so also add in the dates you are not available due to other case commitments. ...continued on page 3

Moving towards paperless trials in BC Are you ready? PART I

The last few years have seen sweeping technological changes in the legal community, and the future promises even greater shifts. E-trials in BC, and throughout Canada have been a rare exception. With case sizes increasing, and a corresponding pressure to cut costs, what do you do? Avoid out-of-control costs and control what you can. Having the best toolbox, and streamlining workflow to maximize efficiency is the only way to effectively handle this. Running E-trials is the next step in the process.

Marketing ROI: Measure twice, cut once.

Everything we do in marketing should be carefully pre-planned and budgeted to achieve a desired result.

If your firm has to do less marketing so that you have time and space to plan your marketing – “measure twice and cut once” – it will be well worth it. In many cases, once you've cut, you can't uncut. The ad has run, the special event is over, the seminar is finished. You can't get the time, resources or dollars back. So, how do you ensure you're getting the highest return for your marketing

dollars and non-billable (marketing) time?

Legal administrators – whether in marketing, human resources, IT, accounting or elsewhere – are in a proverbial gerbil wheel. Often our challenge is to reduce its speed, or even stop it altogether, so we can spend a fraction of time contemplating, considering, debating and strategizing the activities of the year ahead.

No question we're still busy – maybe even busier now that many firms truly understand the value and necessity of marketing – but now, we're more strategic. Unlike 15 years ago, you'll now often find marketing at the management table, meeting regularly with the Managing Partner and participating in strategic conversations. ...continued on page 4

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TOPICS in this issue

Moving toward paperless trials in BC P1

Part 1 of a 2 part series examining some considerations law firms should bear in mind when preparing for the move to paperless trials. In this part, Tracy Ayling of Tracy Ayling Litigation Support outlines the top three rules law firms should follow for an efficient and stress-free E-trial.

Marketing ROI P1

Want to make sure you are getting the most return from your marketing spend? Susan Van Dyke of Van Dyke Marketing provides tips for creating a marketing plan that allocates resources appropriately and helps you get the buy-in you need to move your business development activities forward.

Tips for your knowledge management program P5

Designing and implementing a knowledge management program takes a lot of work and planning. Lawson Lundell's Director of Knowledge Management, Euan Sinclair, offers his top 10 tips for designing the best program for your firm and getting lawyers and support staff to spend time on knowledge management work.

BCLMA Summer Social P7

Every year the BCLMA Summer Social continues to attract more and more attendees. This year, our guests took in the spectacular view from Bridges, enjoyed delicious food and drinks, and some particularly lucky party goers went home with a prize. Check out our summary and photos of the social. You might recognize some familiar faces!

Reducing the risk of internal fraud P12

Law firms are increasingly conscious of the risk of internal fraud. But are your systems protecting you from employee fraud? In this article Pelar Davidson, Financial Controller at Oyen Wiggs Green & Mutala LLP, looks at best practices in creating an internal controls system to protect against the risk of fraud.

DEPARTMENTS

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Who We Are

The BCLMA, founded in 1972, is a non-profit organization with 130 Representatives and 250 Affiliates across BC. It is the BCLMA's goal to provide educational and networking opportunities, to enhance skills as legal administrators and managers, and to provide professional and personal benefits to its registrants.

Member Services

The BCLMA provides opportunities to network with other law firm administrators and managers at annual Spring and Winter socials, and monthly subsection meetings. We host an annual Managing Partners Event, and a large conference every other year.

Website

The Job Bank provides information on employment opportunities for all types of legal-related and lawyer positions.

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Newsletter Services

Topics is a public newsletter. Contact the Editorial Committee to provide comments on articles, to offer suggestions for articles in future issues, or to augment the circulation list. We welcome your feedback! Please send comments to membership@bclma.org.

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Paperless trials... continued from page 1

With an E-trial you need to factor in preparation for an electronic setting. Communicate with the other parties far ahead of trial, (months in advance not weeks).

Some things to consider:

- Where is the trial? How many parties are involved?
- Logistical considerations such as room configuration?
- Are you using a common presentation laptop?
- How to treat exhibits and entered documents.
- What about cost-sharing, (i.e. monitors for the judge and witness)?
- Do you need video conferencing?
- What about Read-ins?
- What format? (PDFs are the standard.)

Rule 2: Prepare for the unexpected

Firstly, don't panic. As in life, things happen. Computers fail, hard drives crash, databases corrupt, and data is lost. What's your backup

plan? You don't want to wait until it happens in the middle of your presentation to find out, so plan accordingly. Peace of mind is a valuable thing, so I always prepare a complete back-up copy of all of my materials on a second laptop, bring a spare hard drive, and several USB keys. I have a full copy of the database and images, and a backup copy of the exhibits. If one system fails, I can move to the other system with little downtime to the court. You do not want to be in the position, (at 9:45 a.m.) where you can not continue your presentation due to a system failure, and court is dismissed for the day, or longer.

Rule 3: Keep it as technically simple without compromising your ability to bring your best case

Striking the balance. This is a really critical point. Your case should be enhanced by your technology, rather than overshadowed by it. Also, a short trial is a very different dynamic than one scheduled for 2 years. Do you have complex diagrams, or spreadsheets with hyper-linked sheets within? If you do, then don't forget

your audience in all of this, and definitely don't forget that you will need to package this for the Appellate review afterward, so that means it can't be accessed by an icon solely found on your computer, as the judge will not have this. Keep in mind that while technology is a very powerful ally and can make or break a presentation, you don't want your audience to get lost in all of the technology. Confusion is never a good thing, and you don't want to pay the ultimate price by having evidence or arguments misinterpreted, and, therefore, discounted in the final analysis.

Stay tuned for Part II of this series, where I'll be discussing: the first successful large Alberta E-trial; Emerging Trends in Evidence Management systems and how this will affect E-trials in the future; and the Key Benefits of having E-trials.



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ON THE MOVE

New Member Firms and their Representatives

Andrea Bechtold, **Dreyer Davison Lawyers LLP**, Langley
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Member Firms and their New Representatives

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Effective September 23, 2013



Lori Hart



Dewi Kuipers



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Avril Tysoe

Marketing ROI... continued from page 1

Here's what I believe we should be discussing:

1. Plan for success. Set your goals and objectives first, whether it's a firm-wide plan, practice group plan or an individual lawyer plan. Follow that step with identifying the strategies – the “how” you're going to meet those goals – and finally, the “what” you're going to do. That final step is the busy work of marketing, but it's strategic because it maps back to your goals and objectives. Understand why you are engaging in every marketing activity and what you need it to achieve. Is it client retention? Obtaining intelligence on a prospective client? Demonstrating your credibility to a prospect? Raising the firm's profile within specific industry groups?

2. Put business development first. All that we do and all that we spend must, ultimately, lead to retaining or attracting work. Everything you do must connect to a plan, strategy a goal, or another marketing or business development initiative. Ultimately, marketing supports business development.

Practice group discussions and planning with individual lawyers who wish to grow or redirect their practice, should centre on where they can develop new work. What is their competitive edge? In which areas can they legitimately push their stake in the ground? It is these discussions that lead to strategic activities. You'll see better buy-in by everyone when they understand why you're asking them to blog using keywords, give a seminar, plan a lunch with referral sources, and rewrite their bio and so on. We are asking our firms and lawyers to market, but actually, we should be asking them to develop business. Just switch that agenda item from “marketing” (the activities) to “business development” (the end goal) and watch the conversation turn a corner.

3. Use your data. Don't look now, but you are sitting on a lot of corporate intelligence. It's lurking, waiting to be noticed, right there in your own accounting system. Clearly it's a successful month if you get all lawyers to record all their time and get bills out, but what many firms are missing is the value of all the data recorded over the years.

It will show you, among many things:

- What are the emerging trends?
- Where are cross-selling opportunities?
- Who are your VIPs and your referral sources?
- Who's missing that you haven't noticed? Have some clients dropped off?
- Trend analysis – are billings increasing in the areas you are focusing on (clients, practice groups or lawyers)

I have found enthusiastic and enormously helpful accounting managers who are

instrumental in extracting the data needed. One word of caution: the reports may never be 100% accurate given changes to your areas of law, changes to client names or differing methods to file opening, but do carry on. We're not performing surgery here, so let's accept a small margin of error and get on with analyzing what your data is telling us.

4. Support your rising stars. Now, I know you love all your lawyers the same, right? Just like with our kids, we could never, ever, choose between them. However, if we really want to stretch our marketing (business development!) resources, we need to pick the lawyer who will take your firm's resources the furthest. Who are your stars? Your fearless leaders? Who has a clear and logical outlook on all things business

development, including a commitment to effective follow-up strategies? Support them, help them plan their marketing, get them the necessary resources and then, let them do their thing.

Some will write well, a few prefer one-on-one networking and others have a knack for leaving a room of strangers with a fist full of business cards from the most influential people. Leverage those who are actually bringing in the work.

Above all else, measure twice before you lower the saw.



Susan Van Dyke is the principal of Van Dyke Marketing & Communications. Along with her team, she helps law firms realize higher ROI in their marketing endeavours. susan@vandyke.ca

WHEN BARELY-A-PULSE IS JUST NOT ENOUGH.

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Ten tips for getting started with your knowledge management program

“The secret of getting ahead is getting started.” — Mark Twain

1. Form a plan. You will need to have a clear sense of the objective and what success will look like.

Align your objective with the firm’s business goals. For example, do you envisage that your knowledge management system will have banks of precedent documents (sometimes called standard forms) with notes to cover every situation, or do you just want to capture best practice examples on the fly?

“The secret of getting started is breaking your complex overwhelming tasks into small manageable tasks, and starting on the first one.” — ibid

Once you are clear on the objective, you can draw up a road map of how to get there. A knowledge management program can typically be broken down into a series of projects, which can be further broken down into a series of discrete tasks.

2. Form a broad, cross-spectrum knowledge management committee and plan for success. Consider who will have the responsibility for keeping your knowledge resources fresh

before adding hundreds of documents. You will probably need a dedicated project manager, whose job description includes responsibility for the knowledge management program. Try to set a realistic target with regular milestones to maintain momentum. You could try to run the program off the sides of people’s desks, but it will probably fail. It’s sad but true to say that knowledge management work will inevitably sink to the bottom of any in-tray.

3. Ensure you have the unwavering support from the firm’s executive. The introduction of knowledge management will require significant expenditure of resources (money, time or probably both) so make sure that the executive is fully prepared (see 1, above) and committed. The executive should visibly demonstrate support for the program and promote the program at any opportunity. Spend some of the initial goodwill capital on a high-profile statement of support for knowledge management.

4. Designate a knowledge management repository — a space away from the noise and



clutter of the firm’s work product. Make sure it is easily accessible to everyone in the firm or interest will quickly dwindle. Don’t feel pressured into launching the knowledge management program until the program has reached a critical mass.

5. Rome wasn’t built in a day. Remember that leading a knowledge management program is a long-term endeavour. Some projects might not seem particularly useful initially, but will pay off in the longer term. For example, the benefit of adding the resources of a small practice group will become much clearer as new people join that practice group. ...continued on page 6

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Ten tips... continued from page 5

6. Allow practice groups the freedom to organize their own resources. They are much more likely to use that collection if they can assert some form of ownership of it. Proscription will lead to resentment. Practice groups should review their resources on a regular basis and carry out gap analysis to identify what other resources can be added.

7. Consider how best to engage and incentivize busy lawyers to contribute time and knowledge resources to the program. Lawyers are notoriously time-poor and it's always going to be a hard sell if you are asking lawyers to spend non-billable time on knowledge management work. A program that relies simply on volunteers and goodwill may become skewed over time towards the contributors' interests.

8. The temptation may be strong, but try not to rush to a software solution. The three components of a knowledge management program are people, process and technology, and all three components should be balanced evenly. Spend time learning how people work at present. A knowledge management program requires commitment from people to change the way they work by sharing and collaborating. Unfortunately, there are no shortcuts.

9. Don't rely on search engines, either.

Google search for law firms does not exist. Although there are some very good enterprise search engines available, remember that Google has spent billions of dollars analyzing web traffic and perfecting their algorithms. Sometimes lawyers don't really know what they are searching for, in any event. Browsing knowledge resources with consistently applied keyword names or meta-tags within a well thought-out taxonomy will be a useful alternative in that case.

10. Empire or Republic? Consider which fits your office culture better: the "Empire" approach where resources are channelled

through a gateway and locked down; or the "Republic" approach where any user has licence to add to or amend your knowledge management resources. The advantage of the Empire approach is quality control and integrity, but the prevailing trend is towards a more "social" user experience with the Republic approach.



Euan Sinclair is Director, Knowledge Management at Lawson Lundell LLP and Co-Chair of the KM Sub-Section. Any views expressed in this article are his own.

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BCLMA SUMMER SOCIAL

The BCLMA annual Summer Social was held on June 6. Oh, what a night! The sun was shining and the weather was warm. Add some chilled local beers, a great selection of wines and plenty of delicious food and we had the perfect evening to celebrate this popular event at Bridges Restaurant on Granville Island.

One hundred and thirty five Representatives, Affiliates and Alumni members attended the social. It consistently grows year after year!

Del La Terra provided the upbeat background Latin Music, while photographer extraordinaire Anna Beaudry was busy taking individual photos of members for our website directory.

Our "reception" format has once again proved to be a hit among BCLMA members and our sponsors. Everyone had the chance to move around and mingle.

Dye & Durham Corporation, represented by Clive Bellian, Roshni Reddy and Grant McLaney were in attendance as one of our Premier Sponsors. ZSA Legal Recruitment, our other Premier Sponsor, was represented by Elizabeth Borrill, JoAnne Peppiatt and Graham MacLennan.

Also joining us again this year as a summer social event sponsor was Ricoh Canada. Steve Sanghera and Paddy Carroll represented this well-known document management and image communications company.

Corporate Couriers Logistics, our second Event Sponsor, was represented by Esther Ng and Nazia Akbar.

BCLMA was very lucky to have two contributing sponsors for this year's summer social: BMC represented by Brian Mauch and James Robertson, and Arlyn Recruiting with Stephen Danvers and Diane Cronk.

The emcee was our newly-elected President Anita Parke of Thorsteinssons LLP who stood proud without crutches after dislocating her knee the day before the event.

Our generous sponsors donated draw prizes too. Congratulations to all our winners!

- **ZSA** – Dinner at Hawksworth won by Monique Sever, Harper Grey
- Bottle of Pol Roger won by Lily Ling, Stikeman Elliott
- **Dye & Durham** – Tickets to Les Miserable won by Joanne Gaska, Mandell Pinder
- **Corporate Couriers Logistics** – Wireless speaker system, won by Jacquie Wintrup, Lawson Lundell
- **Ricoh Canada** – iPad Mini won by Tim Wurtz, Baker Newby
- **Systems Auditing** – Dinner at L'Abattoir won by Lisa Evenson, Harper Grey

- **MPHM Project Managers** – Certificates to Earls & the Cactus Club won by Ann Main, Klein Lyons
- BCLMA drew 12 names for 12 different wine bottles.

Thank you to everyone who attended our annual Summer Social, it was another successful event. Thank you to all our sponsors! We greatly appreciate the ongoing support of BCLMA events.

For more pictures of the summer social visit the social events page at www.bclma.org



Photos by Dennison Lee. L-R

A. Caitlin Turner, Sabine Eckardt, Lorraine Burchynsky and Avril Tysoe from Boughton Law take in the view from Bridges restaurant

B. Summer socialites Charmaine Hall, Catharine Rae, Sandra Evans of Borden Ladner Gervais LLP and Suzanne Redmond from White Raven Law Corp of Surrey



BCLMA SUMMER SOCIAL



Photos by Dennison Lee. L-R

C. Annie Ronen of Harper Grey joins Janice McAuley from Lawson Lundell and Agustino DoSouto of Harper Grey for some patio time

D. Chelsea Dunbar of McCullough O'Connor Irwin, George Lo from Alexander Holburn and Dorothy Cheung of McCullough O'Connor Irwin

E. Two marketing ladies, Heather Ritzer from Gowlings and Priscilla Wyrzykowski, of Alexander Holburn, enjoying the sunshine

F. Finance subsection affiliates Andy Yu of Clark Wilson, Christa Warner of Harper Grey and David Poon from Alexander Holburn spend some time catching up

BCLMA SUMMER SOCIAL



Photos by Dennison Lee. L-R
 G. Joining us from Richmond - Dale Annesley, Marissa McCaffery and Dan Phung, all from Pryke, Lamber, Leathley & Russell

H. Heather Cathcart of Jamal Law Group with Carina Bittel of Clark Wilson chatting at the social

I. Reunited again: Leslie Morgan of Harper Grey. John Hawke from McLeod Law Donna Kitagawa of MacKenzie Fujijsawa, and Agustino DoSouto from Harper Grey

J. Office Services and Facility Managers Alicia Bond of Bull Housser & Tupper and Harmony Cornwell of Blakes

K. Lily Ling from Stikeman Elliott mingles with Lisa Ezaki and Margaret Cividino of Miller Thomson





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PAULA'S PERSPECTIVE

Paula's challenging new scenario:

Maryanne, a paralegal, has been working with Joe for 10 years at a small firm. Joe has a busy practice and he works seven days a week. Maryanne often works long hours in order to keep up with Joe's workload. She regularly comes in late in the morning and works until 8:00 or 9:00 p.m. as Joe is his most productive in the late afternoon. In 2012 Maryanne gives birth to twins. When she returns to work in early 2013, she tries hard to keep up with the workload but it is difficult now that she has a family. Joe expects Maryanne to continue to work late into the evenings but her husband works the afternoon shift and she has trouble finding childcare that stays open after 6:00 p.m. Initially Maryanne's mother took the twins in the evening, but once they started walking she found it too difficult and told Maryanne that she can't do it anymore. Maryanne then approaches Joe and tells him that she can no longer work after 6:00 p.m. because of the twins. Joe gets very upset and tells her that they have always been a team and that she needs to make her own childcare arrangements so that this can continue. He won't listen when she says that she has tried but that she can't find childcare open after 6:00 p.m. Joe then goes to the managing partner at the firm, Sue, and tells her that Maryanne has to be let go as she can no longer provide what he needs. Is there any risk in Joe's approach?

Read our new scenario, then tell us how you'd address it. Your response will be reviewed by labour lawyer Paula Butler. Contributions by you and Paula will help you and your colleagues in the BCLMA solve difficult issues they might encounter in their firms. Please know:

- Your response is 100% anonymous, even to the editors – unless you sign your name in the response form.
- And why would you sign your name? WIN! If you sign your name, you'll become eligible to win a \$25 gift certificate to London Drugs. And you still remain anonymous to our readers! We never publish winners' names.

When you've read the new scenario, email heather.ritzer@gowlings.com to let us all know what you would do.

Next edition, we'll print a selection of responses, combined with Paula's commentary and perspective.

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Internal fraud: Reducing the risk

From the fall of the energy goliath Enron in 2001 to the ubiquitous identity theft, fraud has made its way into society's collective consciousness. In fact, the Law Society of BC has created a link on the main page of its website to address this pervasive issue as it affects law firms: Fraud Alerts and Risk Management (in the *Lawyers* section). While much of the focus in the articles and Alerts is on external fraud, one article provides law firm administration with guidelines for reducing exposure to the risk of internal fraud: Do your systems protect you from employee fraud?



At the Finance Subsection's May 2013 seminar on fraud, Patrick McParland of Grant Thornton LLP noted that while both employees and owners commit fraud, the form of that fraud differs, with employee fraud including theft of assets (cash, inventory, and equipment) and owner fraud taking the form of false reporting. According to McParland, fraud occurs when opportunity, motivation, and rationalization collide.

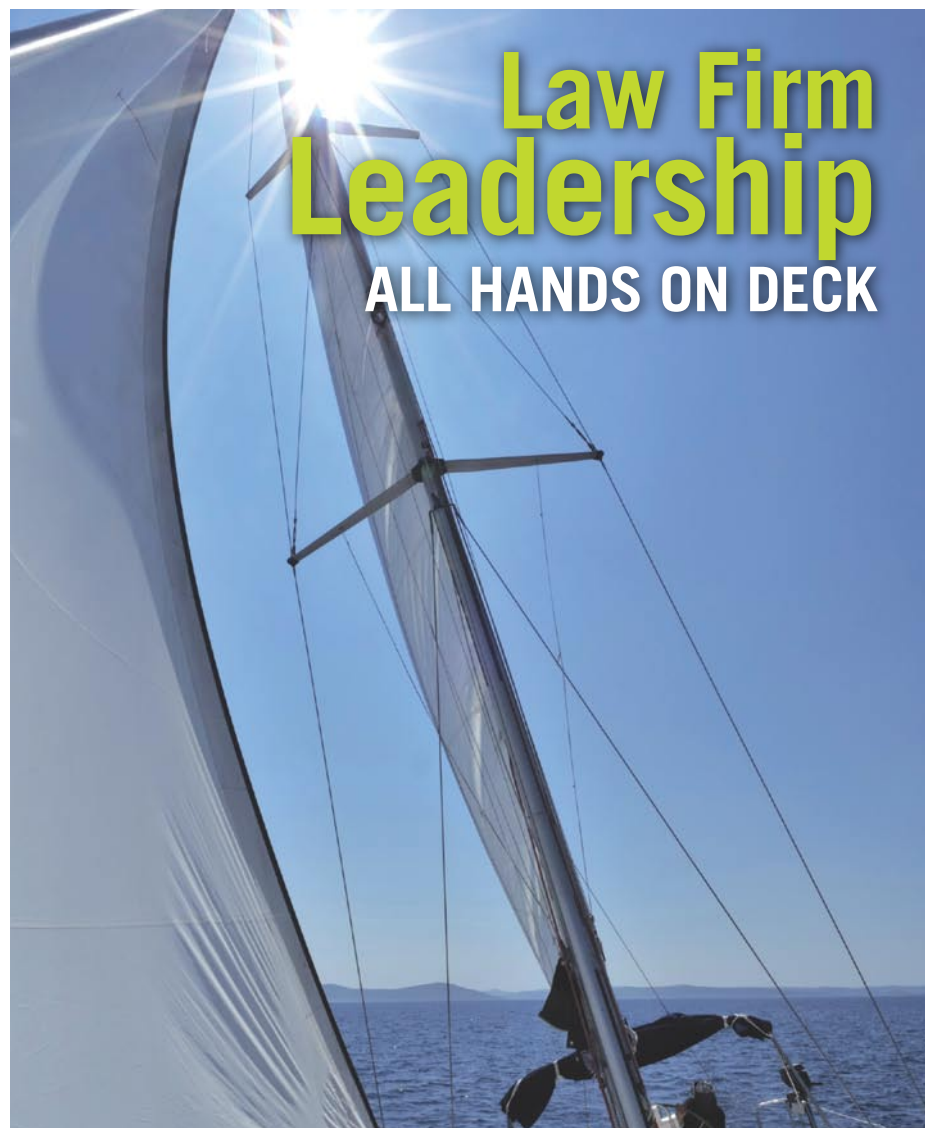
In order to protect against the risk of fraud, it is essential that a system of internal controls be adopted and implemented. That system is a set of policies, procedures, and processes that provide reasonable assurance that the accounting records are reliable, assets of the firm are properly safeguarded, and operations are effective, efficient, and comply with applicable laws and regulations.

An internal controls system starts with an organizational plan that includes clear lines of authority and responsibility. Key to such a system is the hiring of competent and trustworthy personnel who are properly trained. In addition, procedures that physically safeguard assets against unauthorized use/abuse are necessary (e.g. locking unused cheques in a filing cabinet that is only accessible by authorized staff and restricting access to financial reports).

At the cornerstone of any system of internal controls is the segregation of incompatible duties, namely: authorization, custody, and record keeping. The effect of this segregation is to reduce the ability of one person to both commit and cover up the misappropriation of firm assets and/or the misclassification of financial entries.

As a side benefit, it also reduces the number of unintentional errors.

Some examples of segregation of duties include: not returning signed cheques to the preparer of those cheques; having a person separate from the ...continued on page 13



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Internal fraud... continued from page 12

cheque signer initiate and/or approve a purchase; and having a person separate from the person who records the accounts receivable deposit client cheques.

However, even when duties are segregated, a change in technology can result in a loss of that segregation. For instance, while old payroll systems entailed the printing of physical cheques, new systems allow employers to directly deposit pay cheques, with employees having the ability to access their payroll records online. This means that the former separation between the duties of adding or terminating employees in the payroll system and of handing out the paycheques has been overridden. In cases such as this, it is necessary to come up with an offsetting control.

For this reason, and because internal controls do not always work in the way that was initially intended, it is a good policy for law firms to regularly review their system of internal controls. If the firm does not have the resources for such a review, they can engage the services of an outside accounting firm.

A review of a firm's internal controls might reveal areas where improvements can be made. However, all internal control systems involve some form of trade-off between cost and risk. In fact, in a small firm it might be cost-prohibitive to hire sufficient staff to segregate incompatible duties. However, the direct involvement of the owner(s) in a small firm can compensate for an otherwise weak system of internal controls. Small firm owners' close relationship with staff enables them to evaluate competence and trustworthiness directly. When owners take on the responsibility for signing all cheques, reviewing the bank reconciliations (including supporting documentation), and accounts receivable, accounts payable listings, and trust listings, they can ensure that unauthorized disbursements are not being made.

Both small and large firms alike can benefit from engaging the services of an external accounting firm to conduct a review or audit of the firm's financial statements on an annual basis. For firms with weaker internal controls, a more rigorous review or audit could compensate for these weaker controls. The Law Society's regular trust audit—designed to ensure that law firms are abiding by the Law Society's Rules and that law firms are not misappropriating trust funds—also provides a level of assurance for BC law firms.



Pelar Davidson is the Financial Controller for Oyen Wiggs Green & Mutala LLP, a member of the Topics Editorial Committee and the Chair of the Finance Subsection.

SAVE THE DATE

BCLMA & Human Resources Subsection seminar

How to Provide Employee Compensation that is Fair & Effective
Tuesday, September 17, 8:00 am–12:00 pm
Offices of Borden Ladner Gervais (seating is limited)

BCLMA Educational Event

How to Have your Valuable Ideas Heard
Tuesday, November 5, 11:45 am–1:30 pm
Four Seasons Hotel

BCLMA Managing Partners' Lunch

Guest Speaker: Mark Beese, President, Leadership for Lawyers
Wednesday, November 6, 12:00 am–1:30 pm
Four Seasons Hotel

BCLMA Annual Winter Social

Thursday, December 5, 2013, 5:30 pm
Terminal City Club

BCLMA Biennial Conference

Thursday afternoon March 6 & Friday, March 7th, 2014
Market Place, March 6, 4:00–6:00 pm
River Rock Casino Resort, Richmond

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EXPERT OPINIONS

Planning for a successful lateral hire

Lateral hires at the partner level are becoming increasingly common. Unfortunately, according to panelists at this year's LMA conference, the latest US stats on legal lateral hires show that 30% of laterals leave within 5 years and 20% are under-performing. So what are the steps you can take to ensure that the lateral hire is successful? We have asked three experts for their recommendations.



Elizabeth Borrill, ZSA

The most important factor in lateral hire success is recruiting someone who will best fit within an organization. In order to ensure this, we find it is critical for employers and employees to understand their true motivations: employers should clearly understand the business case for hiring someone, and job applicants should clearly understand the real reasons they are initiating a job search and what they find most gratifying about their work.

Once these needs have been identified, we initiate a thorough interview process which is required to probe further into the issues on each side. Applicants should meet their future boss and colleagues, and interviews should address the firm's corporate culture as well as the merits and challenges of the position at hand. Further, the candidate's career goals should benefit the trajectory of the business, to ensure a long term match, and expectations about how success will be defined and measured should be clearly established.

When a candidate has been identified who has the right skillset, the right personality, and goals that are in line with the firm's objectives, an offer should be extended that is fair and competitive with the current market rate. The offer should address monetary compensation and benefits, as well as what to expect during the orientation and transition phase. Ensuring the success of a lateral hire is about finding someone with the right skill set, screening him or her based on the needs and direction of the business, and in maintaining open communication to ensure continued success.



Allison Wolf, Shiftworks Coaching for Lawyers, and Kathy Hogarth, Marketing Manager at Lawson Lundell LLP

Below are some of our practical tips for how marketing can help invest in the success of your next lateral hire:

1. Identify a primary marketing team contact at the firm for the lateral to go to with questions and/or for assistance.
2. Integrate the lateral's contacts into the firm's CRM system and review and identify connections and potential business opportunities.
3. Ensure the usual announcements are carried out, including: firm website, local and national publications, intranets, and social media.
4. Have the primary marketing team contact and/or coach work with the lateral to develop a comprehensive business plan that would include:
 - Goals for the lateral's first year at the firm
 - Identifying key lawyers at the firm for the lateral to connect with
 - Business opportunities with the lateral's clients/contacts
 - Business opportunities with the firm's contacts
 - Opportunities for the lateral to meet/interact with the firm's clients
 - Opportunities for the lateral's clients/contacts to meet with members of the firm
5. Out of the above plan develop a short one month action list and meet with the lawyer monthly or bimonthly to review the plan and map out

ongoing next steps.

6. Have the lateral invited to the firm's practice group meetings where there are potential cross-selling opportunities and give the lateral a few minutes at the meeting to introduce his/her background and experience.

The above tips are all aimed at business development. Equally important to the successful and long term integration into the firm are the close relationships the lateral hire will form with colleagues. After the welcoming round of lunches and dinners it is important that the lateral has ongoing opportunities for further informal interactions with colleagues. As a coach, Allison also encourages the lateral to take active steps to build not just professional, but personal relationships, with a few colleagues at the firm.

Equally important to the successful and long term integration into the firm are the close relationships the lateral hire will form with colleagues.



Shayne Strukoff, Managing Partner, Gowlings

When we are beginning the process of hiring someone for a lateral position, we first look at the firm as a whole to see what areas of expertise we need, and we also keep the economy as a whole in mind. You want to think about this as the beginning of a long-term relationship. With this in mind, we consider not only how this person will fit into the firm fulfilling immediate needs, but also how he or she will evolve and grow with the firm by anticipating, as much as possible, future changes in the economy.

Once we have identified what kinds of practice areas we are looking to grow, we then find the best person. Fit is very important and we get quite a bit of intel from staff and professionals about what this person is like to work with. We also want to make sure that we are building a talented and diverse team where everyone is given the opportunity to shine.

After finding the right person and hiring them, helping them through the transition is the next big step. Understandably, moving to a new firm can be a very stressful experience. To minimize this stress, we work with marketing, IT, HR, and accounting to make sure that all of the infrastructure is in place when the person joins the team. We also set up informal buddying programs with other lawyers, and set up more formal systems within the various practice groups to ensure that the new hire is properly integrated early on. As managing partner at Gowlings, I help coordinate this process and make a point of checking in with the new hire on a regular basis to make sure they are fitting in nicely and enjoying their new place of work.



Expert Opinions is curated by Heather Ritzer, Marketing Communications Coordinator at Gowlings and Editor of Topics. Comments and story ideas can be sent to heather.ritzer@gowlings.com

VOLUNTEER HEROES



The BCLMA has the good fortune of attracting excellent volunteers who step up to dedicate their precious time, knowledge and energy to the success of the Association. Our Volunteer Heroes feature highlights the hard work and dedication of our volunteers, and also shares their advice and plans. In this edition, we honour **Raf Sansalone** who is a founding member of the HR subsection. She is a long-time volunteer with the BCLMA organization and has mentored a lot of our members on Human Resources issues over the years.

How long have you been a member of VALA/BCLMA

I joined VALA around 1982 or '83 when the Association was relatively new.

When I started at Ladner Downs/BLG in 1981 there was little in the way of a formal HR department. What I needed to learn and better understand was the business side of the legal profession driving the decisions.

VALA provided me with the support and knowledge base that I needed, especially as it grew and developed setting up subsection groups. HR became one of the largest and most active sub-sections. As firms expanded, they required more structured HR practices.

I was among a core group of HR folks - Penny Harvey at Russell Dumoulin (Fasken), Tina Giallonardo at Swinton and Co (now Miller Thompson), Nadia Morrison from Clark Wilson, and Barbara Montague from Davis. We were committed to making our firms great places to work and, despite being competitors, we supported one another. We bounced ideas off each other and could always rely on one another if we simply needed a listening buddy. We always felt it was very important to mentor new members.

List your contributions to VALA/BCLMA.

I was part of the VALA executive team in the role of Secretary for a number of years in

the early '90s. I was involved in organizing the Conferences including the Western Regional Conference. My focus has always been on HR and I have been committed to lending my support to the HR section.

What motivated you to contribute?

People would just ask me to help. The mandate for the Association was to assist, educate and grow its membership. Information sharing was crucial. I established a network of people I could really trust and people who could provide answers to the day to day HR issues and questions. The reciprocal nature of these relationships and networking was a big part of it for

...Continued on page 16



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Volunteer heroes... continued from page 15
me. It also helped my firm, Ladner Downs.

What did you enjoy the most about BCLMA and contributing to the organization?

I enjoyed the relationships I developed with other members and other firms the most. I have established many great friendships. We have all "grown up" together and I value the trust and respect we have for each other.

How do members make the most of their membership?

The more you get involved and build relationships within the organization the more you will get out of the Association. For senior members, mentoring newer members can be very rewarding, while new members benefit from volunteering with the organization by having a place to ask questions and gather information that would help them in their roles in the law firms.

Looking back through all your experiences, what are 3 tips you can share about working in law firms?

1. When you are new in your firm, don't try to change things overnight. Be an observer and learn the business. Get to know people and gain their trust. Start with these basic concepts to build a strong foundation before you start making changes.
2. Law firms are complex and unique environments. There are multiple bosses on site every day and at times conflicting interests and priorities. It is a difficult environment to navigate and it's important to understand multiple perspectives and opinions.
3. You have to understand that lawyers and staff are your clients. Do not do anything that is not in the best interest of the firm.

What's next for you?

This is a crazy, complex business. I love my work and we have a great team here. I feel a tremendous loyalty to our partners. I look forward to whatever I am doing. Ideally in 3 or 4 years, I would like to slow the pace down a bit. I'm thinking about succession planning and feel that I am building a great team that can continue to support the lawyers and staff at BLG. I would love to continue to be a part of the firm's success by taking on project work that will support and enhance what the HR team does. This would give me more flexibility and allow me to really devote my time to specific needs of the firm.



Volunteer Heroes is interviewed by Sunita March. If you've got the spirit, contact any Board Member or subsection leader (see back page) to learn more about volunteer opportunities.

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