Examples and Tricky Situations

EXAMPLE #1: Difficult to place in a competency category.

SESSION TITLE: Making Risk Reward

SESSION DESCRIPTION:

Are you a risk taker? In our firms and businesses, we manage risk reward daily, which is needed to support successful client health, deliver on the strategic plan and vision and to help our firms and businesses manage through these challenges and rise above the competition. In this session, action sports athlete and stunt coordinator JT Holmes shares how he utilizes risk to rise above, survive and thrive, and stay at the top of his industry. Through managing and using risk to his advantage, he has achieved staying power and excellence that few elite athletes in his field enjoy. We'll hear how he analyzes and prepares for stunts, selectively chooses his endeavors, and how risk reward has enhanced his confidence about his mindset while performing under pressure, and his love for innovation and progression.

Learning Objectives:
• Discover how to use risk to your advantage in your role.
• Analyze the benefits of managing risk reward to enhance confidence in decision-making.
• Create a healthier organization culture by cultivating innovation and progression through risk assessment techniques.

APPROVAL LANGUAGE:

CLM® Application Credit for Functional Specialists: 1 hour in the subject area of Legal Industry/ Business Management (LI) toward the additional hours required of some functional specialists to fulfill the CLM application requirements

CLM® Recertification Credit: 1 hour in the subject area of Legal Industry/ Business Management (LI)

WHY THIS SESSION IS TRICKY:

The session does not directly match any of the competencies listed in the Principal Administrator KSA Ratings that are used to analyze sessions. However, since the main focus of this session is risk assessment, it can be categorized as a business function. It does not qualify for CLM Application Credit because it does not cover a specific skill listed in the management categories.

EXAMPLE #2: Difficulty placing in a competency with Application Credit
SESSION TITLE: The Balance

SESSION DESCRIPTION:

Can you do it all? What does that even mean? Allison Jones, ALA Region 5 Representative will share tips and tricks for staying sane in our fast-paced roles as legal management professionals. In addition to exploring ways to find your balance, she will highlight some of the latest initiatives from ALA aimed at providing members the resources and tools you need to function at your highest level, both personally and professionally.

Learning Objectives:
• Recognize why and how stress impacts your personal and professional success at work and home.
• Create a strategy to help balance the fast-paced role of a legal administrator.
• Discover your stress cues and stress cures so you can better prepare for and manage the elements of your life that cause anxiety, while boosting the areas that bring you energy and happiness.

APPROVAL LANGUAGE:

CLM® Application Credit: 1 hour in the category of Self-Management

CLM® Recertification Credit: 1 hour in the subject area of Communications & Organizational Management (CM)

WHY THIS SESSION IS TRICKY:

This session is part of a two-day conference dedicated to Workplace Wellness. Wellness is not listed in the competencies but matches the "Knowledge of work place health issues" in the OM category. However, because the session talks about "exploring ways to find balance" and "tips and tricks for staying sane" this individual session is a better fit in Communications & Organizational Management where knowledge of stress and time management techniques are covered.

The discussion of stress and time management skills also qualify this session for CLM Application credit in Self- Management.

Since this is a CM session, it is not eligible for application credit for Functional Specialist.

Important Note: The discussion of ALA initiatives should only be a very short part of this session in order for it to qualify for CLM credit.

EXAMPLE #3 Roundtable Discussion – NOT ELIGIBLE FOR CLM Credit

SESSION TITLE: **Roundtable Idea Exchange: Illuminating Office Processes**

SESSION DESCRIPTION:
Exchange ideas on operations with your peers and take home fresh perspective you can implement immediately on the following topics:
• Stress-Free A/R Collection Calls
• Tracking and Counseling for Billable Hours Goals
• Managed Services – Ins and Outs of Outsourced Staffing
• Records Best Practices (Closing Files, Storage, Digital File)
• Client Conflict Systems & Procedures

WHY THIS SESSION IS TRICKY:
Round table discussions with no education are not eligible for CLM credit

APPROVAL LANGUAGE:
NONE

EXAMPLE #4: Possibly two competencies

SESSION TITLE: **Use an Effective Budgeting Strategy to Drive your IT Roadmap**

Yes, it's that time of year again, kids are going back to school, tree leaves are starting to change color, and the holidays are quickly approaching. Q4 is peaking its head out and it's time for firms to begin compiling their budget requests for the upcoming year, ranging from improving efficiency to strategic growth initiatives. Many firms find the budgeting process daunting when it comes to IT. There are many moving parts with software and hardware upgrades, software and hardware support renewals, ongoing IT security protections, and Windows and Office migrations (just to name a few!). This can lead to second-guessing how much and where the firm is allocating budgetary dollars, contemplating if you are in line with your peers or falling behind. Come to this session to see the current trends in where IT budget dollars are being allocated at small to medium sized law firms.

Learning Objectives:
• Determine if IT budget dollars are being allocated correctly in your firm.
• Analyze the IT needs of your firm.
• Eliminate unnecessary spending and reallocate IT spending to more impactful projects.

APPROVAL LANGUAGE:

CLM® App Credit for Functional Specialists: 1 hour in the subject area of Financial Management (FM) toward the additional hours required of some Functional Specialists to fulfill the CLM application requirement

CLM® Recertification Credit: 1 hour in the subject area of Financial Management (FM)

WHY THIS SESSION IS TRICKY:

This session covers the budget process for IT spending. Initially, it may appear that the session would be OM, because of the technology, it actually fits in with FM because it covers budgets and allocating funds correctly.

EXAMPLE #5 CLM Ethics Requirement
SESSION TITLE: Integrity's Indispensable Ingredient

Ethical lapses across the cultural landscape and the uncertainties of a post-9/11 world confirm that integrity is a timeless yet increasingly timely virtue. In a challenging but encouraging way, this topic is creatively analyzed by exploring such questions as: What are the crucial components of integrity and how can it be memorably defined? Why is it of vital importance to today's workplace? How can it be maintained when those around us operate differently? A presentation on integrity might be anticipated to be dry, boring or preachy, but this one is none of these. As a senior executive once wrote afterward, "Many of our members thought it an unusual topic before you spoke. They all believed it to be a vital one when you finished."

Learning Objectives:
- Understand that integrity is more than simply "being honest" and why all four of its components are necessary for a meaningful sphere of influence.
- Conclude that while an effective leader must have many admirable traits and skills, integrity is ultimately the indispensable ingredient.
- Focus ultimately on the two impactful byproducts of integrity that will keep one vigilant and grounded—even when the going gets tough.

APPROVAL LANGUAGE:

CLM® Application Credit: 1 hour in the category of Organizational Development

CLM® Recertification Credit: 1 hour in the subject area of Communications & Organizational Management (CM). This session also satisfies the 1 hour in Ethics requirement

WHY THIS SESSION IS TRICKY:

This session is CM because it covers leadership traits and skills. It also qualifies for CLM Application credit in Organizational Development because of the leadership skills component. Since integrity is the main focus of the presentation, it could be used to complete the 1-hour Ethics requirement for recertification.

EXAMPLE #6 Session doesn't directly fit in with any competency
SESSION TITLE: Portland's Economic Landscape

Seattle's economy is one of the most dynamic in the United States. We will explore the drivers behind Seattle's historic change and how that transformation will affect Portland's economic future.

Learning Objectives:
• Review the changes in Seattle's economic history and future trends.
• Identify how these changes may impact your firm's interest in the local business community
• Develop key best practices to ensure your firms consistent growth and profitability.

APPROVAL LANGUAGE:
CLM$^®$ Application Credit for Functional Specialists: 1 hour in the subject area of Legal Industry/ Business Management (LI) toward the additional hours required of some Functional Specialists to fulfill the CLM application.

CLM$^®$ Recertification Credit: 1 hour in the subject area of Legal Industry/ Business Management (LI)

WHY THIS SESSION IS TRICKY:
This session doesn't exactly fit into any of the competencies and it may not initially be clear how it supports a legal manager's role. However, a legal manager needs to be aware of all the economic and business changes in their respective city to effectively run a successful firm. After some analysis, we determined this session would best fit under the Legal Industry/ Business Management category.

EXAMPLE #7- Substance Abuse

SESSION TITLE: The Addicted Lawyer – How We Got Here, How to Solve It

Law is a demanding field, and attorneys demand even more of themselves. Attorneys often turn to substances to escape from daily problems and cope with enormous workloads. In this webinar, we will explore addiction in the legal profession. Why lawyers suffer at greater rates than the general public and what the profession should be doing to address it.

Learning Objectives:
- Identify the significant findings from The Hazelden Betty Ford Study on attorney substance use.
- Recognize the stigma lawyers face and ways to break that stigma.
- Identify problems law firms have in dealing with addicted lawyers.

APPROVAL LANGUAGE:

CLM® Application Credit for Functional Specialists: 1 hour in the subject area of Human Resources Management (HR) toward the additional hours required of some Functional Specialists to fulfill the CLM application

CLM® Recertification Credit: 1 hour in the subject area of Human Resources Management (HR). This session also satisfies the 1 hour required in Substance Abuse

NOTES ON THIS SESSION:

Substance abuse is typically placed under HR. It also satisfies the 1 hour in Substance Abuse Requirement for CLM recertification credit.

EXAMPLE #8- CLM Application Credit: Information Technology

SESSION TITLE: Marketing on the Internet: A Perfect Marriage of Law, Business Development and Technology

How does a firm get noticed and compete with the tens of millions of posts on social media today? Where is the best money invested for the greatest return? Where do your business development goals fit in — and how do they drive your strategy and result in opportunity? This session will answer these questions and many more. You'll hear the results of Content Pilot's recent study, Global 50 Law Firm Websites: Ten Foundational Best Practices, receive practical advice about website strategy/design, hear tips on search engine optimization (SEO), and content best practices — all with the goal of winning your firm more profitable clients.

Learning Objectives:
 • Plan to build your next website with business development in mind using the right strategy and budget.
• Break down how to write website and social media content that will turn the heads of human readers and search engine robots.
 • Identify what the world's largest law firms are doing online.

APPROVAL LANGUAGE:
CLM® Application Credit: 1 hour in the category of Information Technology

CLM® Recertification Credit: 1 hour in the subject area of Legal Industry/Business Management (LI)

NOTES ON THIS SESSION:
Social media and marketing fall under the Legal Industry/ Business Management (LI)
This session covers the skill of learning how to use social media and mobile technology, so it qualifies for Information Technology application credit.

EXAMPLE #9- Cyber Security
SESSION TITLE: What Would You Do When the Firm Has a Security Issue?

You can run but you can't hide. Security is on everyone's mind. From email hacks to data breaches, securing your firm (users on-site and mobile devices) from threats is just one of the many responsibilities on every administrator's mind. In order to help you protect your firm, we've assembled a panel of experts from our law firm security community that will be ready to share their knowledge, providing us with protocols and best practices on a number of security-related topics: email spam, scams and spoofing, computer hijacks, cybersecurity and internet browsing, web security, data breaches, encryption and file sharing, loss or theft of devices, removable devices, and backups.

Learning Objectives:

 • Identify threats, vulnerabilities and exposures to organizational data and information assets.

• Analyze various risk methodologies and assess application to individual enterprise environments.

• Explain and utilize risk assessment and analysis methodologies.

• Assess information security controls and countermeasures and their effectiveness.

• Develop risk mitigation strategies for critical organizational information resources.

APPROVAL LANGUAGE:

CLM® Application Credit for Functional Specialists: 1 hour in the subject area of Operations Management (OM) toward the additional hours required of some Functional Specialists to fulfill the CLM application

CLM® Recertification Credit: 1 hour in the subject area of Operations Management (OM)

NOTES ON THIS SESSION:

Cyber security sessions would be categorized as Operations Management (OM) in the Technology /Automation Management section. This session does not cover the "how to" aspect of information technology and therefore would not eligible for general application credit. However, it can be used toward the additional required hours for the Functional Specialist application.