

THE Legal Secretary®

AUGUST 2019



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It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct. — *Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS*

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President's Message

BY HEATHER EDWARDS, LSI PRESIDENT



HEATHER EDWARDS is LSI's President and has been a member of San Fernando Valley Legal Secretaries Association since 1991, the same year she joined the legal field. She obtained her Bachelor's Degree from California State University Northridge. In May 2006, LSI President Mary S. Rocca presented Heather with the President's Award. Heather resides in Northridge, California with her husband of 28 years Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

What is Your Why?

"The two most important days in your life are the day you are born, and the day you find out why." – Mark Twain

Your "why" is what motivates you, keeps you going through the most difficult of times, and it inspires you to aspire for bigger and better things. We often think that we know our "why," but as we look inside ourselves into why we do what we do, our "why" often becomes much more profound than we ever could have imagined or dreamed about. So what is your why?

Thank you to the members of Legal Secretaries, Incorporated, for electing me to serve as your President this fiscal year. The 18th century French philosopher Voltaire wrote, "Is there anyone so wise as to learn by the experience of others?" As we mark LSI's 85th anniversary, we stand at the edge of great possibility. As Voltaire would agree, wise leaders stand on the shoulders of those who come before them. From LSI Past President, Louise B. Cord (1934-1936) all the way to LSI Past President, Jennifer L. Page, CCLS (2016-2018), the shoulders upon which I stand are monumental. The experience that will inform my presidency comes not only from past leadership but also from all members of our LSI family and community.

I want to thank the 45 LSI Past Presidents who have come before me, our legacy, for their guidance, support, and mentorship they have shown me this past year and beyond. They are part of "my why" I joined LSI 28 years ago and why I dreamed of becoming LSI President. My dream is now a reality.

We celebrated our 85th year at the LSI Annual Conference this past May. A very special thank you to Alameda County LSA (ACLSA) for hosting an amazing conference at The Hilton in Newark, California. Conference Chair, Cyndee Saucedo, CCLS and her incredible ACLSA team planned a very fun and successful conference with their theme, "Education Through the Years." We appreciate and recognize the many sponsors and vendors who assisted in making the 2019 Annual Conference a huge success.

On Friday, we had excellent Officer-Chairmen Workshops held at the hotel. Thank you to all attendees. We hope you enjoyed and were educated well. J. Cori Mandy, CCLS, LSI Educational Program Coordinator, did an incredible job of organizing the informative workshops. If you were not able to attend or would like a copy of the handout for each workshop, you may find them on our website: <https://www.lsi.org/conference-workshop-handouts>. The Friday Night Reception theme, "Elementary School Recess" was a lot of fun. Members mingled and networked with our sponsors and vendors, played games, and members got to visit the campaign tables set up by our LSI Treasurer candidates.



On Saturday morning, we attended the Pre-Board of Governors meeting to finalize business for the 2018-2019 fiscal year. Immediately following, all delegates, officers, and chairmen attended the main event, the General Assembly session. A special thank you to our Saturday morning Welcome and Keynote Speaker, Margaret M. Hand, Esq. of Hartog, Baer & Hand who inspired us on Saturday morning. Mary J. Beaudrow, CCLS, LSI Past President 2014-2016, did a wonderful job of introducing the Executive Committee (EC) Members and talked about the EC's high school experience. Election of new officers were held and Donna Day of Alameda County LSA was elected as our new LSI Treasurer. We attended very informative and educational Legal Specialization Section (LSS) workshops under the supervision of the LSS Coordinator, Dawn R. Forgeur, CCLS. Dawn and our LSS Section Leaders are excited to provide excellent educational speakers and topics this year.

The Saturday evening reception was truly enchanting. The evening's theme, "Diamonds by the Bay" did not disappoint and we were spoiled with entertainment by the amazing talent of Fusion Dance Project (Cyndee's daughter Amanda's dance troupe). The evening was capped off with award presentations to winners of the 2018-2019 Golda J. Cooper Chapter Achievement Contest and we congratulated those who attained their California Certified Legal Secretary (CCLS) certification. In addition, the following awards were presented:

President's Award 2018-2019: Barbara Barregar, Orange County LSA, LSI Editor of The Legal Secretary magazine

Rising Star Award 2018-2019: Donna Day, Alameda County LSA, LSI Legal Professional Training/Seminars

Above and Beyond Team Award 2018-2019: LSI Executive Committee: Lynne Prescott, CCLS, LSI Vice President & Marketing Coordinator; Rod Cardinale, Jr., LSI Executive Secretary; Jennifer L. Page, CCLS, LSI Executive Advisor; and Kristi L. Edwards, CCLS, LSI Parliamentarian

Sunday morning Brunch theme was "Graduation." Deanna A. Pepe, CCLS, PLS (LSI Past President 1996-1998) served as our Installing Officer and ten (10) LSI Past Presidents served as our Installing Marshals as follows: Diana E. Estabrook, PLS, (LSI Past President 1984-1986); Cheryl Woodson, CCLS (LSI Past President 1992-1994); Patricia E. Miller, PLS, CCLS (LSI Past President 1998-2000); Yvonne Waldron-Robinson, CCLS (LSI Past President 2000-2002); Mary S. Rocca, CCLS (LSI Past President 2004-2006); Lorraine Bettencourt, PLS, CCLS (LSI Past President 2006-2008); Christa Davis (LSI Past

President 2008-2010); Brooke A. Mansfield, (LSI Past President 2010-2012); Mary J. Beaudrow, CCLS (LSI Past President 2014-2016); and Jennifer L. Page, CCLS (LSI Past President 2016-2018). It was my honor and pleasure to announce the 2019-2020 LSI T.E.A.M. As a team, we will collaborate, educate, and move this great corporation forward. The newly appointed officers and chairmen are listed in this issue.

At the Post-Board of Governors Meeting, the 2019-2020 Budget was approved. After Annual Conference, four local associations were winners of scrip tickets for the August 2019 Quarterly Conference to be held in Glendale. Congratulations San Francisco LPA; Sacramento LSA; Humboldt County LPA; and San Diego LSA!

Speaking of August Quarterly Conference, Conference Co-Chairs, Linda Lane, CCLS and Betty Thomas of San Gabriel Valley LSA invites everyone to the Hilton Los Angeles North/Glendale in Glendale, California on August 16-18, 2019. They promise a fun-filled, educational event, and invite LSI to enjoy a Weekend in Paris. More, detailed information regarding the August 2019 Conference is included in this issue and on our website, www.lsi.org.

So what is LSI's "Why?" We are currently in the second phase of our LSI Marketing Plan which will include a roll out later this year of our new LSI website. This new website will be enhanced to better provide you with stellar online education, webinars, and enhancing our visibility on social media. We are in an ongoing process of creating an LSI app for mobile learning or mLearning for on the go education from your electronic devices. Our Publications Revision Committee (PRC) is working tirelessly on our legal publications, The Legal Professional's Handbook and The Law Office Procedure's Manual. We are very close to bringing these publications online in the very near future. Our Legal Specialization Section (LSS) Committee ensures that our LSS workshops and webinar offerings are unsurpassed in providing continuing education and MCLE credit to our members and non-members alike. Our CCLS certification program is like no other. Certification is achieved by passing an 8 hour comprehensive examination (dubbed a "mini bar exam") in California legal procedures, legal terminology, performance skills, reasoning and ethics, law office administration, communications, and legal computations. This is LSI's "Why."

This year, my continued promise is to inspire, educate, and foster growth personally and professionally. We must work together as a united front. We are T.E.A.M. and Together we will Empower & Accomplish More as one. #meetLSI #myWhy

LS

MESSAGE FROM THE EDITOR

BY BARBARA BARREGAR

During the past year we have had a feature in the magazine called “Meet LSI” wherein the LSI Executive Committee, the Continuing Education Council, the Legal Specialization Section Leaders, the LSI Editor of The Legal Secretary, and, in this issue, the CCLS Certifying Board, have written articles telling us about the positions they hold and about themselves so we get to know them better.



This year I would love to continue our “Meet LSI” feature but also include local associations. LSI has a wonderful 85 year history and it wouldn’t exist if not for all of the local associations who have kept it going! I’ve been reading through the “History of Legal Secretaries, Incorporated” and can’t believe some of the incredible history of this great organization. In 1934, it started with Long Beach, Los Angeles and San Diego and continued on from there. Wouldn’t

it be great to find out the history of some of our local associations? When was your association chartered? How did your association come to fruition? Has there been any name change? Is there any interesting historic facts about your association? What’s going on with your association now? It would be great to get a picture of your association’s executive committee altogether when you submit your article. If you have any questions, email me at LSI.TLSeditor@gmail.com and please send me those articles!

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Congratulations to LSI’s Newest California Certified Legal Secretary!

The following individual is to be recognized and commended
for passing the March 2019 CCLS exam:

Julie Marchese Seiger, CCLS | Contra Costa County LPA

Passing the CCLS examination is a tremendous achievement and this new CCLS deserves kudos for rising to the challenge and proving that hard work, dedication, and commitment can lead to fantastic results!



CCLS Recertification Checklist

- Complete 15 hours of CLE ☐
 - Self-Study – no more than 5 hours ☐
 - Administrative/Mechanical (Secretarial science) functions performed by legal support staff – no more than 6 hours ☐
 - Topics not unique to legal support staff – no more than 2 hours ☐
- Certificates of Attendance/CLE for completed classes/workshops/seminars ☐
If submitted in paper, please submit **copies – not originals
- Certificates signed / co-signed (CCLSs cannot sign their own certificates)** ☐
- Handouts for classes of more than 1.0 hour ☐
**If handouts are voluminous, please send front and back pages, TOC and speaker's biography; if necessary Certifying Board will request copy of entire handout
- Payment of \$25 (check or PayPal) ☐
- Electronic submission to cclsrecertification@gmail.com ☐
- Paper submission to: ☐

CCLS Recertification Chair
Laurelyn P. Bergfeld, CCLS
c/o SFVLSA
P. O. BOX 10531
Burbank, CA 91505-0531

The above is not an exhaustive list. The Certifying Board ("CB") strongly recommends that all CCLSs read the Standards for Recertification that is posted on LSI's website for more detailed information as well as any updated information before recertifying.

****Paralegals – if you signed your own certificate, it must be co-signed by your supervising attorney**

MEET THE CCLS CERTIFYING BOARD

The California Certified Legal Secretary (“CCLS”) is a program created by Legal Secretaries, Incorporated, in 1986. The program is sponsored by LSI but administered by The California Certified Legal Secretary (CCLS) Certifying Board. The Certifying Board is an autonomous group separate from LSI, and has its own officers. The purpose of the program is to create and administer a comprehensive exam to be administered twice each year that tests qualified legal support staff in various areas of law, ethics, practical work product, and office administration.

Passing the CCLS exam is quite an accomplishment, and will provide you with many benefits, including self-confidence, gaining knowledge in various areas of the law which will make you a more valuable employee, and attaining recognition as a legal professional among your employers and peers. Also, as a CCLS, you will increase your marketability and be able to demonstrate to a potential employer that you have knowledge in many areas of the law.

The CCLS Certifying Board consists of seven members, five of whom are members of LSI who have been certified as CCLSs and two of whom are attorneys and/or educators. The LSI members serve 4-year terms and the attorney/educator members serve 2-year terms.

The Certifying Board meets once a year in person to conduct its annual meeting during the LSI Annual Conference in May. At this meeting, the Board elects its officers and chairmen for the upcoming year, makes committee assignments and conducts its business.

The Certifying Board are appointed officers of LSI. One member of the CCLS Board is also designated to be on the Marketing Committee.

The 2019-2020 Certifying Board Members are:



CCLS Certifying Board Chairman – April Ignaitis, CCLS

April is employed as a corporate business secretary at Cooley LLP in the Bay Area and has been in the legal field for over 25 years dealing with mostly class action, complex litigation, and administrative hearings. She has been a member of Santa Clara County LPA since 2007 and has served as their past Historian and Treasurer. She obtained her CCLS designation in 2015 after attending a CCLS luncheon the year before. After hearing all the inspiring stories during the luncheon, she was motivated and determined to obtain the elite designation the following year. Which she did. She has served on the Certifying Board since 2016.



CCLS Vice-Chairman/Secretary – Barbara Haussmann, CCLS

Barbara is employed as a paralegal/legal assistant at Michaelis Montanari & Johnson and has been in the legal field for over 30 years dealing with civil litigation including aviation insurance defense litigation. She has been a member of Conejo Valley Legal Professional Association since 1997. She is currently the President/Treasurer and has held many positions throughout the years. At her first meeting, Deanna Pepe PLS, CCLS was the speaker who she had gone to legal school with many years ago and learned about the CCLS program from Deanna. Barbara obtained her CCLS designation in 1999 after a couple tries. She has served on the Certifying Board since 2016. Barbara and Martin also own American Waterworks where they sell purified water, bottles, containers, and many health products.



CCLS Recertification Chair/Marketing Committee – Vivian L. Shreve, CCLS

Vivian has been a member of Santa Clara County LPA since 2013. She is a past CCLS Chair for Santa Clara County LPA (“SCCoLPA”) and is currently the Programs Chair, MCLE Coordinator and the CEC Coordinator. She is also a member of the Marketing Committee for LSI. She is the current out-going Recertification Chair and incoming Certification Chair. She has worked for Wilson Sonsini Goodrich & Rosati in Palo Alto for almost 11 years as an Executive Assistant, supporting four litigators, but has been in the legal field for over 30 years.

Vivian actually grew up in the legal field. Her step-father was a criminal defense attorney and her mother was the office manager in his office. Vivian spent many of her weekends and summer vacations helping with loose filing and getting the monthly billing statements sent out – paper ledger sheets, folded, stuffed into envelopes with stamps! No e-billing back then!

CONTINUED ON PAGE 7

MEET THE CCLS CERTIFYING BOARD

Continue from page 6

After getting married and having 3 children, she moved to the Bay Area and has worked in Insurance Defense and Civil Litigation. She learned about LSI and the CCLS Program through a now retired CCLS who encouraged her to take the exam. So, in 2013 she joined SCCoLPA, immediately signed up for the study group and ordered all of the study materials. She took the exam in October 2014 and passed. She then took on the role of CCLS Chair led a successful study group for a few years until being asked by Past President Jennifer Page, CCLS, to join the CCLS Certifying Board.



**CCLS Policies Coordinator –
Laurelyn P. Bergfeld, CCLS**

Laurie earned a BA in English Literature from Pepperdine University and a Certificate in Data Processing from Marymount Manhattan College.

She is a fifth generation native Californian and has two adult children and four, almost five, grandchildren. She reads, goes to the movies, and knits or crochets when not working in law offices.

Laurie has been working in the legal field over thirty years, starting in New York and moving to California. She has been a legal secretary, attorney-certified paralegal, law office administrator, and has worked for sole practitioners and multi-national firms. While technically retired, Laurie is working as a long-term temp in Los Angeles. Laurie was part of the revival of the Glendale/Burbank LSA in 1992, and when it later dissolved, moved to San Fernando Valley LSA ("SFVLSA"). She is currently President of SFVLSA, and has served as Governor, Parliamentarian, Executive Secretary, Bulletin Editor, and other assigned chairmanships. In 2012, Laurie served on the LSI Ad Hoc Committee about a possible name change; in 2019, she was named as Chair for a second Ad Hoc Committee to review the earlier report and present an updated report to the Governors. Laurie earned her CCLS in 1993, and is currently serving on the LSI CCLS Certifying Board.



**CCLS Pre-Exam Coordinator –
Mae Chester, CCLS**

Mae Chester, CCLS has been working in the legal field in data processing, word processing, and as a legal secretary for 35 years. She is happily employed as a Litigation Assistant at Hogan Lovells

US LLP in Los Angeles for the past 19 years. Mae has held a side job for many years as a personal assistant for a well-known author. Mae has been a member of the San Fernando Valley LSA since 2008 and is currently serving as

its Governor. She has also held the positions of Treasurer, Programs Chair, CCLS Co-Chair, Training Co-Chair, and 2018 Annual Conference Co-Chair.

On the LSI level, Mae was appointed to the CCLS Certifying Board in 2018. She has also served on the committee to review the May 2016 Annual Conference minutes, and is currently chairing the committee to review the May 2019 Annual Conference minutes.

After attending multiple study groups, each time feeling as though she did not know enough, Mae hesitated taking the CCLS exam. Upon hearing the inspiring stories at the CCLS celebratory luncheon at her first conference, she committed to take the next exam. Mae passed the first time in October 2010.

As a self-proclaimed yarn enabler, Mae can usually be seen knitting. Having been a textile designer in New York in a previous career, she also enjoys weaving on one of her many looms.

Attorney Members:



Marlene Muraco, Esq.

Marlene S. Muraco is a seasoned employment litigator, with 20 years of experience successfully defending employers against the full panoply of employment law claims including wrongful termination, discrimination,

harassment, invasion of privacy, and alleged violations of state and federal employee leave laws. The primary focus of her practice is on class actions, with particular emphasis on wage and hour claims arising under California law and the Fair Labor Standards Act, including claims for overtime, unpaid meal and rest periods, and misclassification of employees and contractors.

Marlene also regularly advises employers on practical and thorough compliance with employment and labor laws with a focus on employers' operational and strategic needs. In addition to serving as outside counsel to employers, she has extensive experience serving a key role in a company's internal HR and legal functions, which has given Marlene a unique understanding of her clients' business and legal needs and allows her to develop and implement practical solutions to complex legal issues. For example, from 2001 to 2008 Marlene spent two days a week on-site in the employee relations department of a Silicon Valley Fortune 100 technology company providing legal advice and practical guidance on employment issues to the company's human resources and employee relations staff.

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MEET THE CCLS CERTIFYING BOARD

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In addition, Marlene regularly provides management training for clients on all aspects of employment law, including managing within the law, sexual harassment prevention and response, leaves of absence, and termination without liability.



Emily Jill Morrisette, Esq.

Emily Lynch Morrisette is currently the Academic Senate President and Paralegal Program Director, as well as faculty at Southwestern College ("SWC"). She has worked hard towards getting the paralegal program ABA approved, as she recognizes the San Diego and California legal communities need excellent bilingual paralegals. She is the author of Personal Injury and the Law of Torts

for Paralegals and Business Law and Organizations for Paralegals. While Ms. Morrisette has been an attorney for many years, and has had been a partner in her own law firm as well as working in several different law firms, mainly focusing in business law, her true passion is in pro bono work. She is an integral part of Jaguar Justice, SWC's Legal Clinic, and founded the SWC Cares Closet, a professional clothing closet. She received a grant for online equity teaching practices and for open educational resources, which will help make college more affordable for students. Ms. Morrisette started as a legal secretary in law approximately twenty-seven years ago and personally knows how valuable a well-qualified legal secretary is to a law firm. She is proud to have worked with the CCLS Certifying Board for several years.

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A Program of LSI®



NEWSFLASH

CCLS Recertification Address Change

**Laurelyn P. Bergfeld, CCLS,
CCLS Recertification Chair
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BOLD SIMPLE MEMORABLE



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Quarterly Assignments

THE FOLLOWING ASSOCIATIONS ARE EXPECTED TO SECURE ARTICLES FROM GUEST WRITERS FOR PUBLICATION IN THE MAGAZINE ISSUES SPECIFIED BELOW.

A. AUGUST ISSUE (TO BE SUBMITTED NO LATER THAN JUNE 1ST):

Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, Fresno County, Humboldt County, Imperial County

B. NOVEMBER ISSUE (TO BE SUBMITTED NO LATER THAN SEPTEMBER 1ST):

Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Orange County, Placer County

C. FEBRUARY ISSUE (TO BE SUBMITTED NO LATER THAN DECEMBER 1ST):

Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County

D. MAY ISSUE (TO BE SUBMITTED NO LATER THAN MARCH 1ST):

Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County



CHERE ESTRIN is the CEO of Estrin Legal Staffing, a leading nationwide recruiting firm. She is a former administrator in two major law firms and an exec in a \$5billion corporation; has written 10 books on legal careers and is a national seminar speaker. Chere is a finalist of Inc. Magazine's Entrepreneur of the Year Award; Los Angeles Women of Achievement and has written hundreds of articles. Her blog, The Estrin Report, (<http://www.estrinlegaled.typepad.com>) has been around since 2005. She can be reached at chere@estrinlegalstaffing.com.

What You Need to Succeed as a Virtual Legal Assistant

BY CHERE B. ESTRIN – SUBMITTED BY ORANGE COUNTY LSA

If you are considering a new career, this hot, new field is worth checking out. Virtual Legal Assistants are quickly becoming the latest career trend in an ever-changing legal field – one that now covets the at-home worker.

Not everyone is cut out to be Virtual Legal Assistant and certainly, not everyone has the skills nor the education to succeed. However, if you have the personality, fortitude and time to invest, you can overcome any barriers to entry to this stimulating career.

What You Can Expect

Your role will largely be determined by your skills, what services you want to offer as a Virtual Legal Assistant, and your own definition of the role.

Because every Virtual Legal Assistant has his or her own skill set, you can offer your own unique list of services. Let's review a list of assignments Virtual Legal Assistants often complete:

- ☐ Word processing
- ☐ Data entry
- ☐ Transcription
- ☐ Prepare expense reports
- ☐ Prepare time entries
- ☐ Handle email
- ☐ Bookkeeping
- ☐ Book travel
- ☐ Event planning (meetings or conferences)
- ☐ Assist with PR or advertising
- ☐ Online factual or legal research
- ☐ Answer phones (client will have their phone lines directed to your phone number); transcribe messages
- ☐ Calendaring
- ☐ Draft and send correspondence



- ☐ Preparation of legal documents i.e., pleadings, subpoenas, eFilings, motions, declarations, and more
- ☐ Preparation of minutes, minute books, contracts, agreements, NDA's, annual reports, employment agreements, dissolutions, formation of corporations
- ☐ Work with the Secretary of State
- ☐ Schedule depositions and court reporters
- ☐ Create reports
- ☐ Prepare spreadsheets
- ☐ Bill clients
- ☐ Edit and proofread documents
- ☐ Pay bills
- ☐ Bulk mailings – email and hard copy
- ☐ Paralegal services and assignments
- ☐ Create databases
- ☐ Internet marketing
- ☐ Update client's website
- ☐ Handle social media for the client

The Realities, Pros and Yes, the Cons

Before entering this career, it's best to review the potential upside along with the downside of the Virtual Legal Assistant. One of the biggest advantages is working from home.

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WHAT YOU NEED TO SUCCEED...

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For those of us who have long worked the 9-5+ overtime (or longer) grind, the idea of working from your home seems like a fantasy come true: Setting your own hours; avoiding a teeth-gnashing, mind-numbing commute; wearing whatever suits you for the day; avoiding office politics; and unlimited income potential; are just a few of the many dreamlike benefits.

While there are many paybacks, working from home can have distinct challenges such as strict discipline and total dedication. Distractions not necessarily faced in a traditional office is probably the biggest difficulty to overcome.

For example, if you are working at home so that you can pay more attention to your family, you may be distracted by having to pick the kids up; take them to soccer; go to the grocery store or just hang out and spend time with a loved one. While you set your own hours, you will not be able to comply with each personal demand. Furthermore, to accommodate many of your clients, you have to be at your desk when they are. You must be able to overcome these distractions to be a success and be able to set non-negotiable boundaries.

The first step is to set office hours where you are focused without interruptions. Make sure your family and friends know when you work.

The second step is to determine where you are going to work. It must be in a place where you can have the freedom to work without interruptions, noise and away from household activities.

An additional advantage to working as a Virtual Legal Assistant is incredible independence. You can work from anywhere in the world where there is Internet. Want to zip down to the Caribbean and work at the pool? Yes! Your business is portable and gives you significant flexibility. As long as you have your computer and Internet connection, you are good to go.

There are disadvantages. You will not get paid benefits such as healthcare, sick time, personal days off and vacation. Of course, you can arrange for it but someone else is not paying for lost work and time off.

Healthcare is often an important consideration. There are organizations specializing in small businesses and self-employed such as the National Association for the Self-Employed that offer affordable health insurance.

Another disadvantage is financing. If you are underfinanced, it can be very detrimental. Make sure you have enough savings to get going. It could take six months or longer.

If you do not work for a virtual assistant company and choose to start your own business, you need to be vigilant in keeping business records. You will be responsible for paying

your own local, state and federal taxes on a regular basis. If you are not good at this, it can become a huge disadvantage.

Probably the biggest complaint is the potential loneliness in working at home. If you are a “people person” and thrive on face-to-face contact, this might not be for you. While you communicate with your clients, you will not have the comradery of coworkers. Decide whether you can thrive and strive while working alone.

Specializing

Many Virtual Legal Assistants specialize in certain practice areas. This makes sense as you can corner a market. Bear in mind that specializing has disadvantages. If you specialize in an area that goes up and down according to market conditions (such as real estate), your potential income might be subject to a wild ride. Here are a few practice areas where Virtual Legal Assistants specialize:

- ☐ Personal Injury
- ☐ Bankruptcy
- ☐ Intellectual Property
- ☐ Civil and Criminal Litigation
- ☐ Real Estate
- ☐ Corporate Maintenance
- ☐ Workers Compensation
- ☐ Insurance Defense
- ☐ Plaintiff Litigation
- ☐ Technology and Litigation Support
- ☐ Sales (for vendors)
- ☐ Marketing
- ☐ Legal Research
- ☐ Probate and Estate Planning
- ☐ Labor and Employment Law
- ☐ Family Law

Skills You'll Need

There is specific software that is practice specialty specific. Whether you are working for a virtual assistant company or on your own, the following skills are necessary:

- ☐ **Ability to communicate clearly – both spoken and in writing:** Your writing must be sophisticated and at the attorney level. Remember, your clients are now viewing you as their right-hand person representing them at their best.
- ☐ **Internet savvy:** You must be familiar with best practices and how to maneuver the Internet. You must know how to use online message systems such as Skype and Facetime, efax, use Outlook,

CONTINUED ON PAGE 12

book travel, and be willing to keep up-to-date with advances directly affecting your clients

- **Social Media savvy:** Your clients may want you to check Facebook, Instagram, Twitter, LinkedIn and other social media platforms. The more you know, the more you will earn.
- **LinkedIn profile:** You must have a LinkedIn profile and know how LinkedIn works. This helps in marketing services. Knowing your way around may be required to research potential clients and candidates.
- **Quick thinking:** This is an important skill. You don't know what your client is going to throw at you. You need to process information quickly and respond swiftly.
- **Decision-maker:** Have trouble making decisions? This career is not for you. If you waffle, your clients will have no hesitation in leaving.
- **Technology savvy:** In addition to knowing your way around the Internet, you need to be technologically savvy. This means all the latest software, strong computer skills and knowing where to get help. You must be advanced in programs such as Microsoft Word and Excel.
- **Ability to proofread:** Proofreading and strong editing skills are required. Clients do not want a Virtual Legal Assistant who produces sloppy work including typos, spelling and grammatical errors or incoherent sentences. They expect professional work every time.
- **Strong management skills:** You must have strong management skills. Staying on top of the workload, other employees, deadlines, and business in general, allows you to succeed. Have knowledge of marketing and public relations to help clients grow their business.
- **Exceptional organizational skills:** You are the cog that makes your client's business stay together. You must be extremely organized and highly efficient. You will most likely be working with more than one client at a time, so keeping everything organized and separate is essential. When the phone rings, you want to know which assignment is critical and the right client it belongs to!
- **Discipline:** The only way to succeed is to be disciplined. That means, you have regular hours, a method to get work done on time and be at the job each and every day. No taking personal phone calls, giving in to interruptive whims, watching a favorite TV show, or taking time to do the laundry. It's worktime.
- **Ability to learn:** Take online courses regularly. You need to keep up with the latest in the law, technology, social media, software, marketing, writing skills, and anything that may pertain to your clients or growing your own business. No one wants to pay for someone behind the times. Be sure to add the courses to your bio.

Education to Succeed

You can become a certified Virtual Assistant. That designation helps you find more work or gain clients. Remember that you work in a field where education is number one. Attorneys value education right up there with experience and expertise. Here are a few online training courses found randomly on the Internet:

Virtual Paralegal Training Center: (www.virtualparalegaltrainingcenter.com): An online training course that has been around quite a few years. The site offers a host of self-paced training books, forms, agreements and templates. The Virtual Paralegal Training center is an online networking community that provides training and resources for paralegals and legal assistants on how to use their skills to become entrepreneurs.

AssistU (www.assistU.com), a virtual online training center that has been in business for 20 years. It offers a Virtual Mentoring Program that is an 11-week online program paired with a total of 16 weeks of 1:1 mentoring showing exactly what you need to do to create a virtual assisting business.

Virtual Success Avenue (www.virtualsuccessavenue.com) is a blog with tons of information and courses (many free) that you can take to become a Virtual Assistant.

IAP College (www.iapcollege.com) offers 6 week courses and a certificate and certification. Established in 1999, the parent of IAP Career College is an award-winning organization named "the #1 place to get published online" by *Writer's Digest*.

Virtual Assistant Training: (www.vanetworking.com)

This social network for Virtual Assistants was founded by a Virtual Assistant who was a single mother of 3 children. The founder wanted to join a social network to support her work at home business. Not finding one for her virtual business needs, she set up a forum of her own and invited a couple of friends to hang out there with her to socialize and talk shop (VA shop that is).

Paralegal Knowledge Institute: (www.paralegalknowledge.com) is an online training organization where you can get up-to-date on relevant litigation support, eDiscovery, and corporate training. The company has been around since 2009 and offers webinars and courses. This author is the CEO.

Before starting any course, get in touch with a live person and ask questions. That way, you will get a good idea if the program is a good fit, if you adhere to the same educational philosophy, and if this is a commitment you are ready to make. You need to know:

- Program's duration
- Experience of the instructors
- Program cost and any additional costs
- Required software
- How long the program has been in existence
- How long you have to complete the program
- Who to call for technical problems
- Whether you are eligible for certification upon completion and if certification is included.

Looking for training close to home? Try local schools and community colleges. Black Hawk College in Moline, Ill., for example, offers a two-semester virtual assistant certificate program.

Networking and Associations

Join an association. Associations offer courses, information, resources and most of all, good networking that can be invaluable.

International Association of Virtual Office Assistants (IAVOA) offers a 10-week training program with Virtual Business Training. The program focuses on starting a virtual assistant business and includes mentoring. With the Reva Training Center, IAVOA offers online classes and mentoring for real estate virtual assistants and referrals for businesses seeking virtual assistants.

International Virtual Assistants Association (IVAA) is a not-for-profit trade association offering certification for virtual assistants and real estate support specialists. For

certification as a virtual assistant, the applicant would review the study guide and take an EthicsCheck exam (\$45 for members) and then the CVA exam (\$120). The CVA exam assesses skill in word processing, accounting, data management, Web design and digital literacy.

The Alliance for Virtual Business (A4VB) is a consortium of virtual assistant groups who want to educate businesses about the role of virtual assistants. The consortium provides virtual assistants with mentoring and information about classes available through Web organizations and schools.

A4VB also hosts the annual Online International Virtual Assistants Convention. Without leaving home, virtual assistants can attend seminars, visit exhibit booths and network with colleagues.

Who hires Virtual Legal Assistants?

Earning potential is all over the board. Job classifieds are seeking Virtual Legal Assistants for as low as \$15.00 per hour and I have read Virtual Legal Assistants claiming you can earn up to \$100 per hour if you own your own business. A couple of job boards for Virtual Legal Assistants are:

- ❑ Virtual Assistant Jobs: (www.virtualassistantjobs.com)
- ❑ Indeed (www.indeed): I found several jobs for Virtual Legal Assistants to work for virtual law firms. One was paying \$51,000 per year.
- ❑ Simply Hired offered 16 virtual legal assistant jobs at this writing. (www.simplyhired.com)
- ❑ Lawfecta (www.lawfecta.com) is a California based legal assistant and paralegal company. Can't hurt to ask.

Scope out virtual legal assistant websites and ask if they are hiring. Many need more legal assistants for their growing businesses.

Trying a new career path is challenging, exciting and sometimes risky. However, a good career plan can take you on an upward climb into a field that may be just the right move. Talk to as many experienced Virtual Legal Assistants as you can. Get educated. Be well financed, up-to-date in your skills and have a positive attitude. Let me know how you do! Here's to outrageous success!

LS



LEGAL SECRETARIES, INCORPORATED
CALIFORNIA CERTIFIED LEGAL SECRETARY
WORKSHOP REGISTRATION FORM
A Good Old-Fashioned Spelling B-E-E

First Quarterly Conference, August 16-18, 2019
Hilton Los Angeles North/Glendale, Glendale, California
Saturday, August 17, 2019, 7:30-8:30 a.m.
Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

With the modern convenience of the spell checker just about everywhere we might type in a word, slang terms that you would find in an urban dictionary, and text messaging abbreviations, knowing how to spell has become a thing of the past. That makes spelling one of the more difficult parts of the Ability to Communicate Effectively section of the CCLS exam. Join us for a good old-fashioned spelling bee and test your skills. Subpoena, S-U-B-P....

REGISTRATION DEADLINE: August 13, 2019

Name: _____ Email: _____
Address/City/State: _____
Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, or by email to quinton@dsmw.com. CCLS
CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



The Continuing Education Council

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Michael Augustine
AUGUSTINE & SEYMOUR

FIDUCIARIES

Selecting the Right One and the Interaction with Them

FRIDAY, AUGUST 16, 2019

5:15 p.m. to 6:15 p.m.

Email reservations to: J. Cori Mandy, CCLS
jcmandy5@gmail.com
619-515-3256 or 619-954-3603

*Seminar is free with a paid conference registration

Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1.0 hour.



LEGAL SPECIALIZATION SECTIONS

August 17, 2019

Deadline to register without late fee: August 11
Section Member - Free | All others - \$15

Legal Specialization Sections Seminars HILTON LOS ANGELES NORTH/GLENDALE

11:00AM - 12:00PM

Probate and Estate Planning

The Role of a Private Fiduciary

Russell Pottharst, PPF
SoCal Private Fiduciary

Law Office Administration

The Ins, Outs, and Uh Ohs of Policy Limit Demands

Michael C. Douglass, Esq.
Wilson Elser LLP

3:00PM - 4:00PM

Specialty Law

Unfair Competition

Jenny L. Riggs, Esq.
Meyers Nave

Criminal and Family Law

What's Happening to Children Today in the Detention Centers?

Jossiel A. Moreira, Esq. and Iris J. Franco, Esq.
Kids in Need of Defense

4:30PM - 5:30PM

Civil Litigation

Reel Justice - The Courtroom Goes to the Movies

Paul Bergman
Professor of Law Emeritus
UCLA School of Law

Federal Law

FRCP 26

Jill Williams, Esq.
Carpenter, Rothans & Dumont LLP

REGISTER ONLINE AT WWW.LSI.ORG

The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.0 hours each, by the State Bar of California unless otherwise specified.

CONGRATULATIONS

BULLETIN CONTEST WINNERS

CLASS A

FIRST PLACE

- San Gabriel Valley LPA – Corinne Patera, Editor of Val Le Gals

SECOND PLACE

- Stanislaus County LPA – Terry Gunter, CCLS, Editor of LeGals

THIRD PLACE

- Placer County LPA – Maria Jasso, CCLS, Editor of Gold Country in Brief

CLASS B

FIRST PLACE

- Orange County LSA – Felicia Wilkins, Editor of Orange Blossoms

SECOND PLACE

- Los Angeles LSA – Reynalda Nogales, CCLS, Editor of The Legal Secretarian

CLASS C

FIRST PLACE

- Sacramento LSA – Dawn Forgeur, CCLS, Editor of The Legal Eagle

SECOND PLACE

- San Diego LSA – Toni Reo, Editor of Legalines

THIRD PLACE

- Santa Clara County LPA - Elise Dresser, Editor of The Advance Sheet

SCHOLARSHIP WINNERS

PLAN A

High School Senior – none (no applications received)

PLAN B

College Student – three applications were judged

1ST PLACE (\$2,000)

- Kimberly Myung
- Sponsoring Association: Stanislaus County LPA

2ND PLACE (\$1,000)

- Jacqueline Eggers
- Sponsoring Association: Los Angeles County LSA

1ST ALTERNATE

- Elizabeth Valverde
- Sponsoring Association: San Diego County LSA

PLAN C

Career Change – one application judged

1ST PLACE (\$2,000)

- Celine Maurice
- Sponsoring Association: Los Angeles County LSA

MEMBERSHIP GAIN CONTEST WINNERS

Congratulations to the following associations for having the most membership gain percentage during fiscal year 2018-2019:

GROUP A

- (0-15 Members) – Marin County LPA (40% Gain)

GROUP B

- (16-30 Members) – Santa Maria LPA (60% Gain)

GROUP C

- (31-45 Members) – Beverly Hills Century City (64% Gain)

GROUP D

- (46-65 Members) – Orange County LSA (44% Gain)

GROUP E

- (66-150 Members) – Santa Clara County LPA (69% Gain)

GROUP F

- (150+ Members) – San Diego LSA (47% Gain)

GOLDA J. COOPER CHAPTER ACHIEVEMENT CONTEST WINNERS

Congratulations to the following associations for winning the Golda J. Cooper Chapter Achievement Contest for fiscal year 2018-2019 in the following categories:

GROUP A

- 0 – 10,000 Points - Marin County LPA (9,700 points)

GROUP B

- 10,001 – 20,000 Points - Merced County LPA (19,850 points)

GROUP C

- 20,001 – 30,000 Points - Stanislaus County LPA (29,175 points)

GROUP D

- 30,001 – 40,000 - (0 submissions received for this category)

GROUP E

- 40,001 – 50,000 Points - Sacramento LSA (45,525 points)

GROUP F

- 50,001 Points and Over - San Diego LSA (59,800 points)



MAY, 2019 | NEWARK, CA

Annual Conference







BOBBY HENDRIX has a unique skillset of both being an MBA and a CPA. He looks at tax, personal, non-profit and businesses transactions with the acumen of both specialties. Bobby recently attained a Certified Fraud Examiner license motivated by recent cases he had handled in which he uncovered fraud or embezzlement. The financial damage has ruined entities and it has had an astounding impact on many individuals associated. For a private consultation regarding your personal, Trust, non-profit or business scenario please call him at 760.567.7712 rhendrix@osbornerincon.com

ORGANIZATIONAL TRUST

BY BOBBY HENDRIX, MBA, CPA – SUBMITTED BY DESERT PALM LPA

Is there too much trust in our organizations?

No owner of a business or executive director of a non-profit wants to think that their employees would ever steal from them. The people in our organizations become like family. Outside of our spouse's, these people are the ones we spend the most time with during our day. We want to trust them. We need to trust them. But, if you have ever heard anyone's story of an internal theft, the phrase that always is mentioned is, "But I trusted them"!

I'm not telling you not to trust your employees. Trust is a big part of organizational success. Trust though without the proper internal controls is a recipe for fraud. So how can you strengthen the internal controls of your organization to help mitigate the opportunity of fraud?

1. Separate the duties of your personnel – this involves designing the procedures of your financial system in which one person doesn't do all of your accounting tasks. For example, the employee that makes your deposits shouldn't be the same person that manages your receivables nor opens your mail. Even in small organizations, tightening up your procedures to make sure that you limit the opportunities for someone to steal is imperative.
2. Culture of the organization – the tone set by the owners, the Executive Director and the Board of Directors of the organization plays a huge part in creating a healthy work environment. If the employees know that the top of the organization will not tolerate certain behavior and that integrity is rewarded, it creates a culture of honesty.
3. Oversight – creating procedures where specific employees or managers have to sign off on certain types of transactions in a timely fashion can help create a layer of accountability to the staff. When employees know they are being watched, they are more likely to not be swayed to do the wrong thing.
4. Third party review – having your independent CPA firm review your organization by doing a risk assessment of your company can tighten your controls and make you aware of potential issues.

Most employees are hardworking and trustworthy to your organization...you wouldn't have hired them if they weren't. Creating an environment that rewards high ethical behavior and creating procedures to mitigate fraud can help keep those trusted employees from doing the wrong thing.

Trust is not a scary word, if properly managed.

CCLS QUIZ:

LAW OFFICE ADMINISTRATION – COMPUTER TERMS

MATCH EACH WORD FROM COLUMN A TO THE DESCRIPTION IN COLUMN B.
THERE MAY BE MORE THAN ONE CORRECT ANSWER – FOR EXTRA CREDIT FIND ALL CORRECT OPTIONS.

COLUMN A

1. TROJAN HORSE
2. OCR
3. LINUX
4. GIGABYTE
5. PRINTER
6. WINDOWS
7. CPU
8. URL
9. ANDROID
10. TOOLBAR

COLUMN B

- A. PROCESSING COMPONENT THAT CONTROLS THE INTERPRETATION AND EXECUTION OF INSTRUCTIONS
- B. OPERATING SYSTEM
- C. OFFERS INSTANT ACCESS TO COMMONLY USED PROGRAMS
- D. SPECIFIC INTERNET ADDRESS FOR A RESOURCE SUCH AS AN INDIVIDUAL OR AN ORGANIZATION
- E. OFFERS INSTANT ACCESS TO COMMONLY USED COMMANDS
- F. OPTICAL CHARACTER READER
- G. 1024 MEGABYTES
- H. OPTICAL CHARACTER RECOGNITION
- I. HARDWARE
- J. COMPUTER VIRUS HIDDEN WITHIN INNOCENT LOOKING PROGRAM

CCLS QUIZ ANSWERS ON PAGE 27

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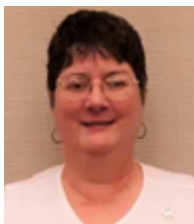


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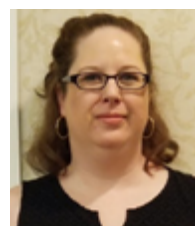
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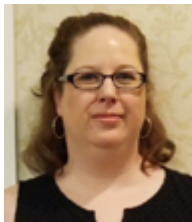
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2019-2020

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and
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San Francisco Legal Professionals Association presents:



"Tour of San Francisco"

November 22-24, 2019

LSI Quarterly Conference

HOTEL REGISTRATION INFORMATION



**San Francisco Financial District
750 Kearny Street, San Francisco, California**

For reservations please contact the hotel direct at 1-800-444-5866 or online at:

https://www.hilton.com/en/hi/groups/personalized/S/SFOFDHF-SFLPA-20191121/index.jhtml?WT.mc_id=POG

GROUP CODE: SFLPA Check in after: 3:00 pm Check out by: Noon

GUEST ROOMS: \$159 per night for king or double queen (plus applicable taxes and resort fee)

AIRPORT: San Francisco International Airport (SFO) is located 15 miles from this Hilton Hotel

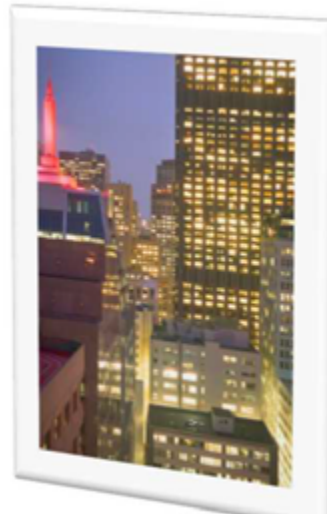
SHUTTLE: Every 30 minutes-from SFO near baggage claim; from Hilton lobby; \$17pp each way
For reservations: 415-775-5121 or: <http://airportexpresssf.com>

PARKING: Hotel self-parking: \$55 per day; Valet parking: \$60 per day

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For additional information contact the Hilton at **1-800-HILTONS** or
Conference Co-Chairs Carol Romo and Larry McGrew at Conference@SFLPA.org





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November 22-24, 2019

LSI Quarterly Conference

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750 Kearny Street, San Francisco California

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Full Name: _____
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Local Association: _____ ☐ LPA ☐ LSA
Title: _____ State Officer/Chairman: _____

SCRIP TICKET (includes Registration, Welcome Reception, Banquet, and Brunch):

Post marked Before October 23, 2019: \$190.00 After: \$200.00 \$ _____

Individual Tickets:

Registration before October 20, 2019: \$ 25.00 **After: \$ 35.00** \$ _____

Welcome Reception (Friday): \$ 30.00 \$ _____

President's Lunch (Saturday): \$ 55.00 \$ _____

Governor's Lunch (Saturday) \$ 55.00 \$ _____

Open Lunch (Saturday) \$ 55.00 \$ _____

For all lunches please select: ☐ New Eng. Clam Chowder ☐ Vegetable Soup

Banquet (Saturday): \$ 80.00 **After: \$ 85.00** \$ _____

Select Entrée: ☐ Chicken ☐ Salmon ☐ Mushroom Ravioli

Brunch (Sunday): \$ 55.00 **After: \$ 60.00** \$ _____

TOTAL: \$ _____

Register online at: www.SFLPA.com Or send check payable to SFLPA CONFERENCE

San Francisco Legal Professionals Association, P.O. BOX 2582, San Francisco, California 94126

E-mail: **Conference@SFLPA.org** (No refunds after October 23, 2019)

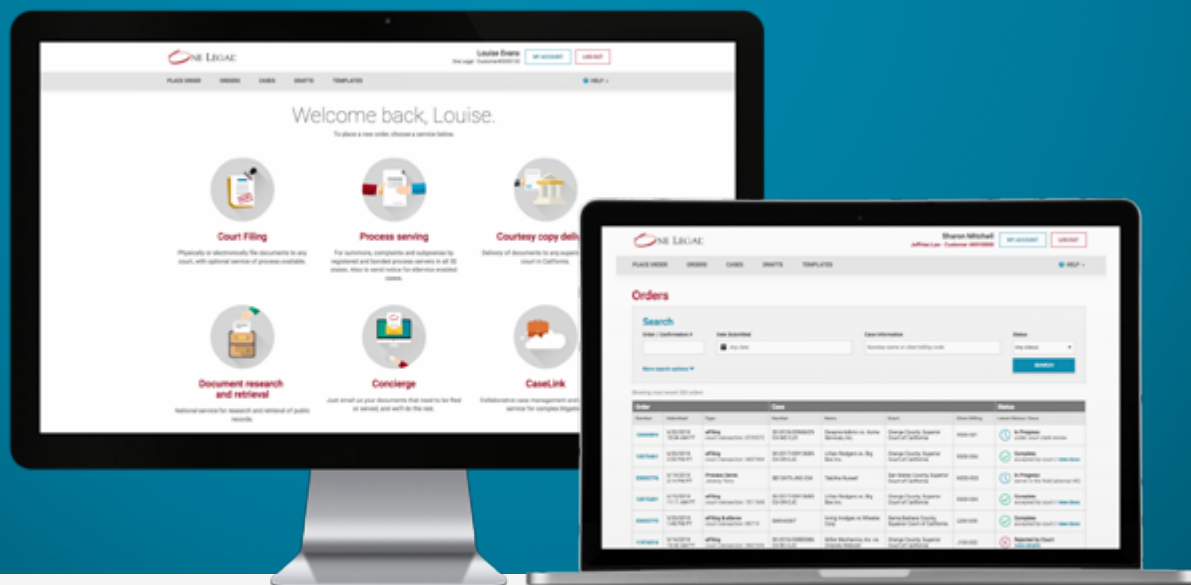




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Dates to Remember in 2019

- July 23, 2019** Last day to apply for September 21, 2019 CCLS Exam
- August 1, 2019** LSS Webinar – (Part 1) “The Case is Actually Going to Trial? What Do I Do Now?”
- August 11, 2019** Registration deadline for Legal Specialization Sections Seminars at LSI 1st Quarterly Conference at L.A. North/Glendale Hilton
- August 13, 2019** Registration deadline for CCLS Workshop (A Good Old Fashion Spelling B-E-E) at LSI 1st Quarterly Conference at L.A. North/Glendale Hilton
- August 16-19, 2019** LSI 1st Quarterly Conference
L.A. North/Glendale Hilton, Glendale, CA
Hosted by San Gabriel Valley LSA
- August 22, 2019** Last day late applications for September 21, 2019 CCLS Exam are accepted
- August 22, 2019** LSS Webinar – (Part 2) “The Case is Actually Going to Trial? What Do I Do Now?”
- September 1, 2019** Last day to submit articles for November 2019 issue of The Legal Secretary
- October 23, 2019** Deadline to register for LSI 2nd Quarterly Conference at Hilton San Francisco Financial District without late fee

FROM QUIZ
ON PAGE 21

CCLS QUIZ ANSWER KEY

- | | |
|-------------|---------|
| 1. (J) | 6. (B) |
| 2. (F), (H) | 7. (A) |
| 3. (B) | 8. (D) |
| 4. (G) | 9. (B) |
| 5. (I) | 10. (E) |



LEGAL SPECIALIZATION SECTIONS

What's your specialty?

Criminal and Family Law, Federal Law, Law Office Administration, Litigation,
Probate and Estate Planning, Specialty Law



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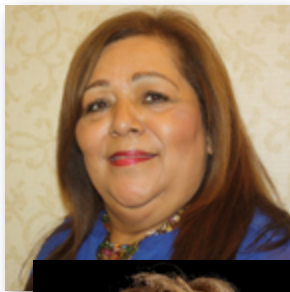
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*LSS webinars are offered at a discount price for members of the LSS.
However, if you join all six Sections, then LSS live webinars are included for free with registration.

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Join us For a "Weekend in Paris" at LSI's 1st Quarterly Conference

BY LINDA LANE, CCLS AND BETTY THOMAS – SUBMITTED BY SAN GABRIEL VALLEY LSA

On behalf of San Gabriel Valley Legal Secretaries Association, we invite you to join us at LSI's 1st Quarterly Conference, to be held August 16-18, 2019, at the Hilton Los Angeles North/Glendale located in Glendale, California. The theme of this conference is "Weekend in Paris" which promises to be a sophisticated, fun and learning weekend.

Friday night's Welcome Reception will feature a Viva Les Tacos Bar (yes, tacos are a universal treat even in Paris) followed by Bingo Night, open to all. At Saturday's night banquet, attendees will enjoy a delicious dinner, followed by a night of dancing with music provided by our DJ, Jim Ayer, with Titan Legal Services. We encourage everyone to wear their finest Paris-inspired attire and chapeaux/fascinators. Attendees at Sunday brunch will enjoy an inspirational speaker before we say our "good-byes" until next conference. Informative and educational programs and workshops will take place on Saturday. And don't miss Don Lee's Hospitality Suite.

The Hilton Los Angeles North/Glendale has recently completed a \$15 million total hotel renovation, featuring a 24-hour fitness center, spa, swimming pool, concierge desk, business center and Wi-Fi in public areas. The hotel has a local shuttle that provides transportation within a one-mile radius of the hotel that starts at 6:30 a.m. to 10:00 p.m. with reservations. Room accommodations for 1 king bed, 1 queen bed, or 2 double beds, are \$175 per night, plus taxes and fees.

The Hilton is located 15 minutes from Burbank Bob Hope Airport with easy freeway access. There is no hotel shuttle service. Super Shuttle is available, with roundtrip prices starting at \$64.00 for first passenger, each additional

passenger is \$29.00. You can download the Super Shuttle Mobile App and receive a 10% discount. No AAA discounts offered. Uber or Lyft is also available to and from Burbank Bob Hope Airport.

There are many things to do in the area, including nearby Universal Studios Hollywood, City Walk, the Hollywood Walk of Fame, Griffith Park Observatory, LA Zoo, and many more attractions. For those of you who like to shop, there is shopping galore at the nearby Americana at Brand and the Glendale Galleria. There are also countless restaurants, some within walking distance of the hotel, and specialty restaurants such as the well know Porto's Bakery, locally famous for its incredible pastries.

If you have any questions or need additional information in connection with the conference, please contact Co-Conference Chairs Linda Lane, CCLS by email (l.lane44@yahoo.com), Cell 818-434-6600 or Betty Thomas (bettythomas317@gmail.com), Home 323-258-3435

We are looking forward to seeing everyone while you stay with us for a "Weekend in Paris"!



LS



MONICA MONTANARI earned a Bachelor's in Business Administration from Menlo College in 2015, and a Master's in Sports Business from The University of Alabama in 2016. Monica is a Legal Assistant and the Director of Social Media at Michaelis, Montanari & Johnson. She is a member of the Conejo Valley Legal Professionals Association, and currently serves as its Secretary. She can be reached at mmontanari@mmjlaw.net.

3 Easy Ways to Bring Your Organization into the Modern Era-A Millennial's Viewpoint

BY MONICA MONTANARI – SUBMITTED BY CONEJO VALLEY LPA

It was my third or fourth day at the firm when my mentor Barbara Haussmann, CCLS, sat me down at a machine and showed me how to turn it on. There I sat in front of a massive piece of equipment straight out of the 80s, with no idea what I was doing. I had always seen typewriters in textbook pictures from the mid-1900s: with their little circular buttons and delightful chimes; but had no idea what the evolution of this invention had looked like in the real world. When she explained how to use it, I swear I probably looked like she had invented fire. “It can delete things too?!” I asked in sheer amazement. Just the novelty of watching every word I typed come to life through a few buttons was absolutely magical. After about ten minutes of figuring out how to work it, I turned to Barbara and asked, in what probably was the most “millennial” moment of my life: “wait...is this considered a typewriter?”

That was the first moment that I realized that in law, I'd see things I haven't seen anywhere else before. The typewriter was just one example. What about these massive files of papers that weren't digitized? When was the last time you saw a brad or a stamp outside the office? If you didn't have to mail things for work, would you even remember how much it costs these days? Today it seems like everything has gone electronic- and the legal field is a reluctant follower. At first, I didn't understand- but as time went on it made much more sense. Computers are still a mystery to most of us. Even though my family had a computer from the time I was about 10-years-old, they still occasionally befuddle me. I can't imagine how confusing it would be if I hadn't been introduced to them at such a young age. After all, it really doesn't take much for an entire case to get deleted in three seconds. All you need is one finger and a delete button (if your computer is nice to you, maybe it will ask you to confirm that you want to delete things; but otherwise, c'est la vie). It's no surprise, then, that we like to keep hard copies of our documents. (Though those can get lost or dusty, it's a chance we'll take. Otherwise, we risk having no documents if we press the wrong button and a case comes back to haunt us.)

There are plenty of firms and organizations going digital, some have gone paperless entirely. But many older firms,



especially in traditional areas of law (like aviation or patent law) have been slow to adapt to these changes. The younger generation is just now starting to enter the workforce; and with them will come lots of modern changes: are you ready? It will mean a lot of innovation, but also plenty of risk. In the legal field, we tend to like to stay comfortable: this is how we've been doing it since the days of the Founding Fathers, so why fix something that isn't broken? That point is completely valid- because the systems are not broken- they're just slow. The rest of the world has started moving at a lightning pace- and if you don't keep up, either your firm's competitors will, or your membership as an organization will start to feel the strain.

So, what are some of these changes that you can suggest or make to bring your firm and/or organization into the 21st century and give it an edge?

1. Informational Transparency

These days, there's help available 24 hours a day, 7 days a week. Do you need technical support on a Friday at 2am? There's someone available for that. Buy a pizza and you can watch as it goes through each phase of creation. Order an Uber and watch exactly when the car turns the corner on the map. I'm not going to wait until Monday morning for my doctor to get into the office to find out what's wrong with me and discover how I can start to fix it; I'm hopping on Google and finding an answer right now! You get the point- we're educated humans, and we want answers. Gone are the days where a law firm could juggle their clients around without answers for days. Clients want communication: especially if they're involved in their first lawsuit. They want to feel comforted, and comfort can only come from having a plan. They don't know your plan if you don't share it with them. And yes, once they do, they might annoy you a little more. But this is why so many firms have begun hiring case managers specifically for client communications. So how can you implement informational transparency in your firm? Don't let any messages go unreturned. Make sure to answer all of your client's questions, and think about putting up a FAQ section on your site to combat the most repetitive queries.

The same goes for members. The more information they have readily available, the more likely they are to participate in things. If you don't take pictures of the fun you have at chapter or larger group events, why would anyone want to join in? In today's world we talk about impressions, the number of times your organization is seen by the same person. The research states that the more impressions we get, the more engagement we'll get, whether that means new members or more attendees. So, putting up thorough calendars and informational packets about upcoming events on your chapter's website is lucrative. But this also comes with the pressure of walking the fine line between ethical marketing and "chasing ambulances."

Speaking of which, when's the last time that website got some love? As the first impression your firm or organization will probably get, your website is crucial. So, ask yourself: is it engaging? Does it show up on search engines? Is there interesting content? If the answer to any of those questions is "no," maybe it's time to talk to someone about fitting some web design into the budget if you're not sure how to do it yourself.

2. Digital Optimization

So much innovative technology has changed the way we live our everyday lives (if you know how to use it). From getting the groceries to transcribing notes, there are so many faster processes we can use to do things nowadays. We talked about it before; and I know it has plenty of downsides, but just imagine: what could you do with all that shelf space that's being taken up by old files? Wouldn't it be nice to be able to use that spare office? Imagine not paying that monthly storage bill! Converting files to digital formats may seem daunting- but it's a lot friendlier than it sounds. Any files you've produced for the case will already be in your system, and if you scan documents as you get them in (or save them if they're emailed), your work becomes much easier. What about that horrible delete button? Backup your files in at least two different places, preferably more, and back them up consistently. Make it a habit, every Friday before you leave or every Monday when you first arrive, make sure all the most current files are stored in an extra location.

In your LSI chapter, you can implement the same strategy. Depending on your web provider, you can even scan the minutes for every meeting on to your site for members to view at their leisure. Our goal is to make our organization so innovative that it can't help but have a strong presence in the community. Do you post your chapter's meeting times in more than one place online? How about having your meetings and events added to the city calendar or a site that specializes in getting groups of people with similar interests together? It's easy to integrate new technology into the lives of your existing members. Have you ever heard of a Google calendar? You can set these calendars up to send alerts to everyone about an event, have them RSVP, and give them notes or directions. The best part? If you do it right, it will sync right to their phones- so they never have to remember an event again. Imagine how much easier that could make life in a firm as well.

3. The Takeaway

It may seem daunting, but the task isn't too hard once you plan it out and break it up into reasonable pieces. Just one post a week on social media; one event at a time on that calendar. It all revolves around cohesiveness: in your firm, in your chapter, in our organization as a whole. As long as we have the same goals in sight, things like acquisition (new membership or new clients) and retention (making our existing clients or members happy) become simple. Instead of terrifying images of computer systems on fire and people running for their lives, we get to sit back, relax, and enjoy the fruits of our labor- using our newly found time for the other 8,000 things we need to accomplish. I may not be able to help with everything- but when it comes to forward progress, it just became as simple as 1, 2, 3!

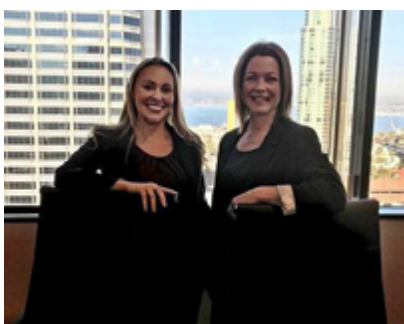
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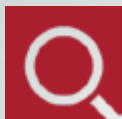
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"I am LOVING the new system! Seriously...very user friendly."

- Alison (Orange County Client)

"Just wanted you to know that I've now used the new portal for two filings and am VERY happy with it. Super easy to use."

- Darla (Los Angeles Client)

"I really like being able to see all cases in one location. It is really easy to use."

- Miguel (Orange County Client)



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