Path to Certification

Presented by:
Patricia Carrera, JD, CAE, CKM, CPLP
Association of Legal Administrators
Sr. Director, Member Experience

DeAnna Ouderkirk, CLM, MBA, SHRM-SCP
ALA Certification Committee Chair
Office Administrator
Sheppard Mullin Richter & Hampton LLP

Overview

• Where are you in your career and where do you want to go?
• Understand the knowledge, skills, and abilities of the legal management professional and how they relate to your professional development & CLM certification
• How can ALA help you on your journey?
• Understand the application requirements, content of the CLM exam and profile of the qualified CLM candidate
Career Stages

- Student
- Specialist/Pre-Manager
- Specialist/Manager
- Generalist/Pre-Manager
- Generalist/Manager

Certification is based on...

- Knowledge Skills & Abilities (KSAs) of a Legal Management Professional
- ALA’s Practice Analysis helps define the tasks associated with your job.
- The most recent Knowledge Skills & Abilities Study identified 65 competencies in a legal administrator job
- The next Practice Analysis will look for similarities and gaps between the current KSAs and the Uniform Process Based Management System Codes (UPBMS).
Knowledge Areas

- Financial Management
- Human Resources
- Operations
- Legal Industry

Attend a Financial Management Session

FM20: The Basics of Life in the Law Firm Accounting Lane
Tuesday, April 16 10:30 AM - 11:30 AM
Lisa Waligorski, CLM

FM11: Best Practices in Support Staff Leverage: How to Run a More Efficient Law Firm and Improve Profit Margins, While Maximizing Staff Productivity
Monday, April 15 2:00 PM - 3:00 PM
Derek Barto & Terri Oppelt, CLM, SPRR, SHRM-SCP

FM32: The Performance Metrics Dashboard: A Powerful Management Tool!
Wednesday, April 17 3:00 PM - 4:15 PM
Frederick J. Esposito, Jr., MBA, CLM
Financial Management Resource Hub

Your Legal Management Resources Hub to FM

Conference Video Recordings
E-Learning
Webinars

Continuing Education
Legal Management Articles
Podcast

Be sure to visit the Resources Hub for additional resources:
Finance Resources Hub

Attend a Human Resources Session

HR13: Nine Minutes on Monday: The Simple Way to Motivate Your Staff
Monday, April 15  2:00 PM - 3:15 PM
James Robbins

HR15: Legal Administrative Assistant Teaming Models - The Next Level & How to Get There
Monday, April 15  4:00 PM - 5:30 PM
Julie Logan, SPHR, SHRM-SCP, Nichole Cornwell, DeAnna Ouderkirk, CLM, MBA, Julie Paul

HR22: The Time Is NOW: Revamping Your Firm’s Performance Appraisal Process
Tuesday, April 16  2:15 PM - 3:45 PM
Michael S. Cohen, JD
Human Resources Resource Hub

Your Legal Management Resources Hub to HR

- Conference Video Recordings
- E-Learning
- Webinars
- Continuing Education
- Legal Management Articles
- Podcast

Be sure to visit the Resources Hub for additional resources: [Human Resource Resources Hub](#)

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Attend an HR Workshop

Advanced Human Resources Administration for Legal Management Professionals

Where: Seattle, Washington
When: Monday, October 21
Time: 7:30 a.m. to 4:30 p.m.
Attend an Operations Session

OM24: Legal Technology 101: Must Haves and More | Brought to you by ALT (the Association of Legal Technologists)
Tuesday, April 16 2:15 PM - 3:45 PM
Rick Hellers, Rebecca Sattin

OM30: Business Continuity and Emergency Preparedness Challenges and Best Practices
Wednesday, April 17 8:00 AM - 9:00 AM
Kathryn Scourby, Wade Tucker, John Hartnett, Jim Rosenbluth

OM10: Cybersecurity Track (Session 1): Cyber Scenario: Simulated Firm Attacks
Monday, April 15 11:15 AM - 12:45 PM
Rob Kleeger, Joe Riccie, CPA

Attend a Legal Industry Session

Tuesday, April 16 2:15 PM - 3:45 PM
Catherine Alman MacDonagh, JD, William Mech, CLM

LI33: Are You Ready for It? The Law Firm Office of the Future
Wednesday, April 17 3:00 PM - 4:15 PM
Jessica Mazzeo, James L. Cornell, III, Tracy Elmblad, Kasey Garcia, Joe McManus

LI20: Turning Retreats into Revenue
Tuesday, April 16 10:30 AM - 11:30 AM
David H. Freeman, JD
e-Learning Courses

HR 1 Course: Employee Selection & Promotion
- First Offering: January 14 - February 28, 2019
- Second Offering: July 16 - August 23, 2019
- Read More

HR 2 Course: Performance Management & Compensation
- First Offering: May 15 - June 20, 2019
- Second Offering: September 16 - October 21, 2019
- Read More

FM 1 Course: Law Firm Accounting
- July 10 & August 20, 2019
- Read More

FM 2 Course: Financial Information & Analysis
- September 16 - October 27, 2019
- Read More

Path to CLM

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<tr>
<th>Foundational</th>
<th>Specialist</th>
<th>Mastery</th>
<th>CLM</th>
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<tbody>
<tr>
<td>Essentials</td>
<td>HR</td>
<td>FM</td>
<td>FM Advanced</td>
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<td>CLM Exam</td>
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When to seek a credential?

- **Anytime!**
  - Valuable educational and career development tool

- **Seasoned legal manager**
  - Demonstrate knowledge earned over the years
  - Continue to identify your accomplishment in retirement as CLM(Ret.)

- **Transferring into the legal management profession**
  - Demonstrate your competence in a new occupation

Why seek a credential?

**For the Professional:**
- Demonstrates competency — knowledge in all areas of legal management
- Increases professional credibility and value to your firm, a seat at the table
- Increases your marketability and ability to compete in the job market; differentiates you from others
- Personal satisfaction
- Preparing for exam enhances skill set & broadens knowledge base
- Recertification helps you stay current

**For the Employer:**
- Employers can efficiently identify qualified applicants
- Employers can promote that firm is run by certified professional
- Encourages and improves job performance

“You owe it to yourself. If you’re going to have a career, why not make it the best you can? The journey is incredible, the benefits you reap at a personal level are even more incredible.” — survey of CLMs
What does it mean to be a Certified Legal Manager?

☆ CLM outwardly demonstrates your personal achievement and professional commitment to your career and the legal management profession.

☆ Demonstrates that you have mastered the knowledge, skills, and abilities to operate at a high level of expertise in the field of legal management.

☆ Shows the legal and “civilian” world that you have an elevated level of knowledge in areas identified as essential to be a legal manager.

What Managing Partners Say

“Attorneys notice and appreciate the CLM’s expertise in managing the business of law at their firms.”

“This certification exam covers very important principles necessary to the effective and proficient administration of a law firm.”

“Lawyers are status conscious, and the CLM provides professional status that they can relate to.”

“The CLM designation is an indication of professional excellence.”
Certification Team

ALA Certification Committee – Nine members chosen for their firm experience and subject-matter expertise.

DeAnna Ouderkirk, CLM, SHRM-SCP
Sheppard Mullin
San Francisco, CA
Chair

Linda Copson, CLM
Downs Rachlin Martin, PLLC
St. Johnsbury, VT

James W. Menendez, CLM
Crary - Buchanan
Stuart, FL

Donna L. Sobkoviak, CLM, MBA
Summers Compton Wells LLC
St. Louis, MO

Ken Koehn, CLM, CPA, CMA
Gould & Ratner LLP
Chicago, Illinois
Vice-Chair

Paula J. Lawson, CLM
Genovese Joblove & Battista
Miami, FL

Debra A. Reeves, CLM, SHRM-CP
Goranson Bain Ausley, PLLC
Dallas, TX

Brenda A. Syle, CLM
Coughlin & Gerhart, LLP
Binghamton, NY

Certification Team

HumRRO is an independent and impartial outside testing contractor that specializes in credentialing programs.

Tiffany Day
Research Scientist

Patricia P. Olejnik, CED (pending)
Associate Director, Experience Planning & Design

ALA Headquarters – ALA Professional Development Team

Patricia Carrera, JD, CAE, CKM, CPLP
ALA Sr. Director, Member Experience

Anne Czeropski, CPP (pending)
Professional Development Specialist

Michele A. Schaede-Guy
Learning Designer

Peggy L. Siems, MSHR, CAS Ed.
Senior Manager of Professional Development
Test Blueprint

- Comprehensive exam – 100 graded questions
- 4 main areas of content
- 9 subject-matter areas
- 1 correct answer (only)
- 3 distinct distractors

Applying for the Exam

1. Download the CLM Application Guide
2. Confirm you meet the Experience & Employment Requirements
3. Complete the Education Requirements
4. Determine when you will take the exam
5. Submit the Application
6. Study
Requirements for Becoming Certified

<table>
<thead>
<tr>
<th>Principal Administrator</th>
<th>Functional Specialist</th>
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<tbody>
<tr>
<td>3 years full-time as a principal or branch office manager</td>
<td>3 years full-time in a supervisory position</td>
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<td>Full-time employment managing a legal organization within 24 months of the date of application</td>
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<td>2 hours in each of the 5 “soft skill” management categories</td>
<td>An additional 15 hours in content areas outside their specialty</td>
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<tr>
<td>All coursework must be completed within 24 months of the date of application</td>
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Application Credit Sessions

- **CM11: Platform Power: How to Electrify Every Meeting, Every Time**
  - Monday, April 15 11:15 AM - 12:45 PM
- **CM12: The Livelihood Wheel**
  - Monday, April 15 11:15 AM - 12:30 PM
- **CM13: Evoke the Secret Sauce to Help New Lawyers Get Off to a Strong Start**
  - Monday, April 15 2:00 PM - 3:30 PM
- **CM14: When Did We All Become Difficult People?**
  - Monday, April 15 2:00 PM - 3:00 PM
- **CM15: From Blind Spots to Breakthroughs**
  - Monday, April 15 4:00 PM - 5:30 PM
- **CM20: General Session: Harnessing Headwinds**
  - Tuesday, April 16 8:00 AM - 9:15 AM
- **CM21: Motivating People from the Inside Out**
  - Tuesday, April 16 10:30 AM - 12:30 AM
- **CM22: Writing as a Thought Leadership Strategy**
  - Tuesday, April 16 2:15 PM - 3:15 PM
- **CM23: Creating a Culture of Excellence**
  - Tuesday, April 16 2:15 PM - 3:15 PM
- **CM24: The Five Roles of the Master Herder: Leadership for Law Firm Leaders**
  - Tuesday, April 16 4:00 PM - 5:15 PM
- **CM30: Better Way to Great**
  - Wednesday, April 17 8:00 AM - 9:00 AM
- **CM31: Establishing Effective Professional Relationships**
  - Wednesday, April 17 1:15 PM - 2:30 PM
- **CM32: Increase Your Influence: Discover Eight Attributes of Successful Leaders**
  - Wednesday, April 17 1:15 PM - 2:30 PM
- **CM33: Communicating with Influence and Impact in the High Stakes Legal Environment**
  - Wednesday, April 17 3:00 PM - 4:30 PM
- **HR13: Nine Minutes on Monday: The Simple Way to Motivate Your Staff**
  - Monday, April 15 2:00 PM - 3:15 PM
- **HR20: Mind Full? Be More Mindful!**
  - Tuesday, April 16 10:30 AM - 11:30 AM
- **OM31: How to Assess and Select Legal Technology**
  - Wednesday, April 17 8:00 AM - 9:00 AM
- **OM32: Increase Your Influence: Discover Eight Attributes of Successful Leaders**
  - Wednesday, April 17 1:15 PM - 2:30 PM
- **OM33: Communicating with Influence and Impact in the High Stakes Legal Environment**
  - Wednesday, April 17 3:00 PM - 4:30 PM
- **HR34: Brezina Memorial Session: Get Out of Your Silo: How to Respectfully Discuss Race, Gender, and Politics in a Fragmented World**
  - Wednesday, April 17 9:45 AM - 11:15 AM
- **HR20: Mind Full? Be More Mindful!**
  - Tuesday, April 16 10:30 AM - 11:30 AM
- **U11: The Successful Meeting: 3 Steps to Maximize the Likelihood of Attendees Being Glad They Were Invited**
  - Monday, April 15 2:00 PM - 3:30 PM
- **OM13: Cybersecurity Track (Session 3): The Legal Requirements Following a Data Breach**
  - Monday, April 15 4:00 PM - 5:30 PM
- **CM31: How to Assess and Select Legal Technology**
  - Wednesday, April 17 8:00 AM - 9:00 AM
Exam Dates – Spring & Fall

<table>
<thead>
<tr>
<th>Exam Date</th>
<th>Application Deadline</th>
<th>Registration Begins</th>
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<tbody>
<tr>
<td>May 13, 2019</td>
<td>March 13, 2019</td>
<td>Open as of January 1, 2019</td>
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<tr>
<td>November 4, 2019</td>
<td>September 4, 2019</td>
<td>Open as of January 1, 2019</td>
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<tr>
<td>April 20, 2020</td>
<td>February 20, 2020</td>
<td>Open as of January 1, 2020</td>
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<td>November 23, 2020</td>
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ALA’s CLM exam is offered online at Pearson VUE’s many testing sites throughout the U.S.

All approved CLM applicants will receive a unique URL and password to register at one of Pearson’s testing locations approximately one month prior to the exam. It is highly recommended that you make your reservation early, as space is limited at testing sites.
Recommended Resources

Financial Management
Any introductory college level accounting textbooks, plus industry-specific resources such as:

- ABA Standing Committee on Ethics and Professional Responsibility (Billing for Professional Fees, Disbursements and Other Expenses). American Bar Association.
- Accounting and Financial Planning for Law Firms (newsletters). Law Journal Newsletters, a Division of ALM Media.
- Robertson, M. Alternative Fees for Business Lawyers and Their Clients. ABA Publishing: Law Practice Division.

Legal Industry/Business Management
General textbooks such as:


General Resources
- Study Guide for the CLM Exam. Association of Legal Administrators (ALA) (alanet.org)
- Law Practice (magazine). ABA Law Practice Division (americanbar.org)
- Legal Management (magazine). Association of Legal Administrators (ALA) (alanet.org)

Human Resources and Organizational Development
General textbooks such as:


Websites containing information on the above, along with related information including:

- Occupational Safety and Health Administration (osha.gov)
- U.S. Citizenship and Immigration Services (uscis.gov)
- U.S. Department of Health & Human Services (hhs.gov)
- U.S. Department of Justice (justice.gov)
- U.S. Department of Labor (dol.gov)
- U.S. Equal Employment Opportunity Commission (eeoc.gov)

Reference materials on current federal laws and government publications such as:

- Family and Medical Leave Act (FMLA). U.S. Department of Labor.
- Patient Protection and Affordable Care Act (PPACA).
Study Groups In Your Area

- Improve your notes
- Support system
- Makes learning fun
- Cover more material
- MOTIVATION!!
- Share expertise

Be sure to attend
FM22: Sitting for the May CLM Exam
Tuesday, April 16 10:30 -11:30 a.m.

ALA Online Community

- Share articles and other study materials
- Sample curriculum outlines from Chapter study groups are posted here
What to Expect at the Pearson VUE Center

Testing Center:
• Computer-based exam
• Cubicle environment with other examinees
• Cannot take anything into the exam
• Calculator on computer
• For notes, provided a piece of paper and pencil
• For sound, provided noise deafening headphones
• Can mark items to go back to answer
• Strikethrough feature to narrow answers

Security:
• May have an electric wand
• May have to empty pockets, raise pant legs to knees, and sleeves to elbows
• Locker available outside exam area to hold drink, ID, etc.
• Breaks allowed, but go through entire security process to get back in

➢ Bring photo ID & testing center confirmation
➢ Dress comfortably
➢ Deduct 20 minutes for entrance security & setup

Find a test center near you at www.pearsonvue.com/ala/

Every 3 years – June 30 or Nov 30

Education Requirements
36 hours of coursework
-- 3 hours in each of 5 subject areas
   CM, FM, HR, LI, OM
-- 1 hour in business ethics
-- 1 hour in substance abuse

Application & Code of Professional Responsibility

Year 1 & 2 –
Annual maintenance fee – $59 due June 1

Year 3 –
Recertification fee – $189
C4: THE LEGAL INDUSTRY CONFERENCE

Wednesday, September 18–Friday, September 20
Boston Park Plaza
50 Park Plaza at Arlington Street
Boston, Massachusetts

C4: THE LEGAL INDUSTRY CONFERENCE is a one-of-a-kind experience that uses design thinking to create solutions in the legal industry. This event focuses on finance, technology and marketing, finding viable answers for the industry, law firms and departments.

ALA Master Class:
Leadership for Legal Management Professionals

Monday, October 21–Wednesday, October 23
Westin Seattle
1900 5th Ave.
Seattle, Washington

The ALA Master Class: Leadership for Legal Management Professionals is all about YOU and YOUR professional growth. This event takes a deep dive into critical personal leadership skills that are vital to an attendee’s career, such as establishing a boardroom presence, handling conflict, difficult conversations and more.
Legal Lean Sigma® and Project Management Yellow Belt Certification Course

Thursday, April 18 8:00 AM - 5:30 PM
Friday, April 19 8:00 AM - 4:15 PM
Gaylord Texan Resort & Convention Center
1501 Gaylord Trail
Grapevine, TX 70651

This two-day program includes lectures, exercises, simulations, videos, discussions, group and table-team work, and demonstrations covering key Process Improvement (PI) methodologies (Lean, Six Sigma), tools and concepts, and the stages of Project Management (PM).
Additional Questions???

Specific Questions About CLM Program, Testing Center, Study Groups?

alanet.org/education/certification

Contact ALA Headquarters:
Patricia Carrera JD, CAE, CKM, CPLP
certification@alanet.org

Thank You!!

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