

AskCody®

11:00 AM - 2:30 PM

Client Meeting

 +3

- Invite attendees
- Book meeting room
- IT requests
- Order catering
- Billing and reporting
- Client matter number
- Book AV
- Guest pre-registration
- Book video conference
- Order table arrangement

AskCody empowers legal assistants and attorneys to take control of their own scheduling and manage meetings with ease.

Used by Law Firms like



Learn more and read full case studies on www.goaskcody.com/industries/lawfirms



Unified Approach

ALA's UPBMS is filling a void and providing a standard for classifying legal operations.



VALERIE A. DANNER
Senior Managing Editor,
Legal Management

It's no secret: Client demands drive legal. Clients control the purse strings, and they will continue to push for more efficiency and transparency from their legal departments. Simply tracking attorneys' time isn't a good gauge of the amount of back-end work — or the cost associated with it — that goes into delivering legal services. ALA's Uniform Process Based Management System (UPBMS) is leading the charge to change this. This set of codes was developed to provide a standard framework for defining and classifying legal operations.

Until now, the legal industry has had no universally recognized standard that improves the understanding of how administrative and operational processes are identified, organized and performed within their organizations. So for the past several years, ALA has been working on developing a taxonomy to create this standard. Coding standards make a big difference, as is evident with the American Medical Association's Current Procedural Terminology (CPT®) — a universal coding system developed nearly 50 years ago. Just as these codes went a long way to streamline reporting within the health care industry, the UPBMS aims to do the same for back-end legal operations.

Nearly three years after the first version launched, Version 2.0 is set to debut. But the UPBMS is already in use. In 2018, ALA put the UPBMS to work in practical applications — as a key part in developing its Job Description Toolkit, for instance. This marked a bit of milestone in the process.

“Once I familiarized myself with the UPBMS, it helped simplify the process of developing new job descriptions. It allows the user to apply clear and consistent criteria when creating a new job description.”

“The UPBMS being put into action is exciting to see,” says Oliver Yandle, JD, CAE, Executive Director of ALA. “It’s been such a dedicated effort by ALA volunteers and staff to get this taxonomy into a place so that the legal industry can work from a common language for legal support operations.”

Laura R. Wickliff, PHR, SHRM-CP, Chief Human Resources Officer with Snell & Wilmer LLP in Phoenix, Arizona, was on the Job Description Toolkit project team. Her role was to help create the toolkit and provide examples of job descriptions in several categories that could be accessed by fellow ALA members.

“I used the UPBMS codes as part of the job descriptions to help clarify and categorize the essential duties for each job description,” says Wickliff. As she worked on the project, she was impressed with how the codes streamlined the process. “Once I familiarized myself with the UPBMS, it helped simplify the process of developing new job descriptions. It allows the user to apply clear and consistent criteria when creating a new job description,” she says.

WHAT’S NEW

It’s progress that has been a labor of love for volunteers like William Mech, CLM, Chief Operating Officer at Goldberg Kohn, Ltd., in Chicago, Illinois, and the Team Leader on the UPBMS project. Mech says Version 2.0 is an enhancement that includes revisions from the first version. “Each version of the UPBMS reflects literally thousands of small editorial revisions from the previous version; Version 2.0 is no exception,” says Mech.

The latest update reflects several significant improvements, including:

- **More Detailed Organization:** Version 2.0 has the code sets grouped into two branches of activities: Legal and Support. “In the previous version, legal activities (activities most commonly performed by paralegals and other paraprofessionals) were contained in a classification labeled Practice Support. Legal activities are now in a dedicated branch, improving the organizational logic of the entire code set,” says Mech.

- **Improved Logical and Consistent Structure:** The Classification of Common Activities was removed and incorporated into other existing classifications. Mech notes this proved a significant challenge that required considerable effort by ALA’s Standards Review Committee, the group of industry professionals tasked with overseeing the UPBMS, but the result makes for a more intuitive structure.
- **Enhanced Classification for Senior Leadership:** The Leadership and Management Classification was significantly revised. “Our previous version had only lightly reflected many of the activities performed by senior leadership,” says Mech. “While there remains work to be done, this section has been significantly improved.”

“If business partners can embrace these standards, integrating them into their solutions and reporting around them, we can help drive the initiative forward.”

It’s not just legal management professionals seeing the benefits of the UPBMS. Eric Wangler, President of BigHand North America, has more than 20 years’ experience on the business partner side of the legal industry and also sits on the Standards Review Committee. “I have consistently heard from law firm clients that they are looking for the ability to benchmark their results to their peers in the industry. The challenge has always been getting to a position where you can have universally accepted standards governing the data to make this type of benchmarking accurate and meaningful,” says Wangler. “The industry has evolved to a much better place with regard to legal billing standards, but there remains a tremendous gap regarding back-office services. If business partners can embrace these standards, integrating them into their solutions and reporting around them, we can help drive the initiative forward.”

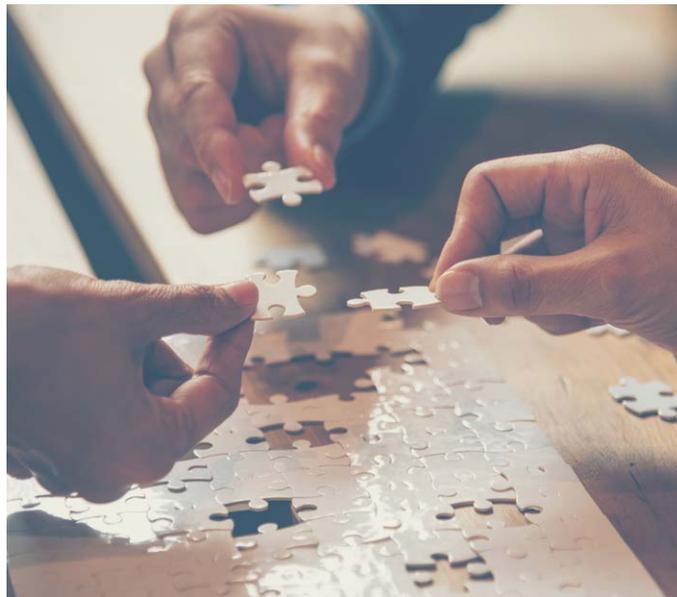
That’s what the UPBMS aims to do — provide that standard framework for legal operations to offer, implement and maintain successful management and operational strategies,

“Our previous version had only lightly reflected many of the activities performed by senior leadership. While there remains work to be done, this section has been significantly improved.”

while encouraging the use of a common language and approach to legal support operations across the industry. It will more accurately capture the costs associated with matters, so firms can better understand the true costs associated with delivering their services.

WHAT THIS MEANS

Mech is pleased with the initial rollout. As the first effort to develop a standard for support activities, the UPBMS has received a positive response from the industry, he says. “Because it is still a very new effort, law firms and legal administrators are learning how to use the code set to support administrative initiatives,” says Mech. He says after the release of Version 2.0, the Committee will focus on educational and promotional efforts to increase adoption.



He also looks forward to it being adopted for more uses. Job descriptions are a natural fit for the UPBMS, because it standardizes headings and definitions that legal management professionals can adapt to their firm’s format. Mech says that there are even more impactful uses to be had, including using the UPBMS to perform job analysis and similar activities such as monitoring key performance indicators (KPIs) and other performance metrics.

From the business partner side, Wangler says he sees implementation picking up quickly. “We are seeing more and more interest from clients as they seek better data to manage their back-office businesses, to get to a standardized view. Now that the codes have been locked down in Version 2.0, I think this will move forward quickly.”

Plus, it just makes good business sense. “I think the implications and opportunities are significant,” Wangler says. “Naturally, from a commercial standpoint, it stands to reason business partners can gain competitive advantage by being part of the solution.” ■

ABOUT THE AUTHOR

Valerie A. Danner is the Senior Managing Editor of *Legal Management*. She has a bachelor’s in journalism and has been writing and editing for various publications for nearly 20 years.



vdanner@alanet.org



twitter.com/LegalMgmt

WE WANT YOUR FEEDBACK

The comment period for version 2.0 of the UPBMS will open on April 11. We’d love to hear from you! Just visit <https://upbms.alanet.org> to send us your thoughts.