

# ALPMA Annual Report 2012 - 2013



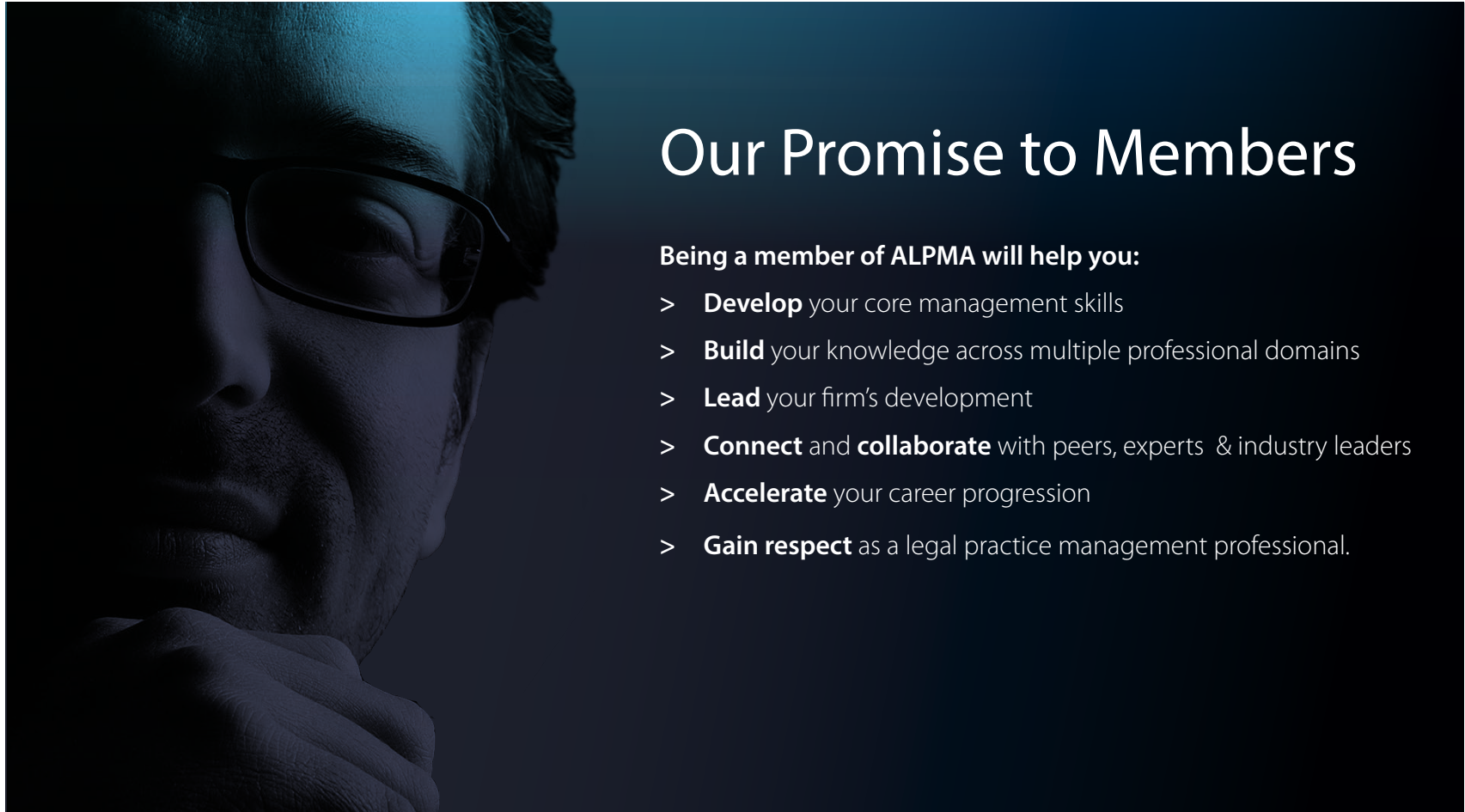
**ALPMA**  
Australasian Legal Practice  
Management Association



Everything we do is designed to deliver on our promise to members.



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## Our Promise to Members

Being a member of ALPMA will help you:

- > **Develop** your core management skills
- > **Build** your knowledge across multiple professional domains
- > **Lead** your firm's development
- > **Connect** and **collaborate** with peers, experts & industry leaders
- > **Accelerate** your career progression
- > **Gain respect** as a legal practice management professional.



## Our Vision

To be the key resource and leading voice for the legal practice management profession in Australasia.

## Our Mission

- Enhance the theoretical and practical understanding, skills and knowledge of legal practice management professionals.
- Promote excellence and innovation in legal practice management.
- Represent the legal management professional within the legal industry and broader community.

## Our Values

Our values provide the members, Board, staff and volunteers with a model against which individual, team and organisational behaviours can be aligned and measured.

**Knowledge:** We aim to grow the knowledge of our members, their organisations, our partners and the legal practice management profession.

**Development:** We strive to support the personal and professional development of our members and the development of their organisations, our partners and the legal practice management profession.

**Community:** We aim to build a close-knit community of legal practice management professionals to support our members, their organisations, our partners and the legal practice management profession.

**Respect:** We treat each other with respect and strive to enhance the respect in which our individual members, their firms, our partners and the legal practice management profession are held.

**Innovation:** We seek innovation in all that we do and encourage innovation by our members, their organisations, our partners and the legal practice management profession.

Innovation  
Professional development  
Community  
Respect  
Partnerships  
Values  
Knowledge  
Our Mission  
Growth  
Legal Practice Management



## Thinking Globally, Acting Nationally and Delivering Locally

This reporting period marks the first year in a 3-year strategic plan for ALPMA and I am pleased to report that we have met our deliverables for the year, and continued to perform at the top of the class in terms of member engagement and satisfaction.

The 2012-2013 year was one where we started to think globally, act nationally and deliver locally. This multifaceted approach will continue to drive ALPMA forward.

We began the year by changing our name to Australasian Legal Practice Management Association with the view of expanding our reach to legal practice professionals across Australia, New Zealand and Asia over the next 5 years.

In February this year, we expanded to WA with our first networking event and the formation of a local WA Committee. I am pleased to say that our member growth in WA has been phenomenal and I would like to thank our new and vibrant WA Committee for working hard to establish ALPMA's presence in the west.

Looking back on the year, we have achieved a lot. The key highlights include our revamped website and improved online services for members, our expanded Learning & Development program – from the ALPMA National Summit where we broke the record with the number of delegates, to the HR Workshops held in March 2013, and our expanded webinar program with record attendees.

We also undertook an extensive review of our membership and pricing structure and introduced a new system of membership pricing to better reflect the value of membership, and reward firms that support multiple members. This change has been well received by members - the overall feedback is that ALPMA membership continues to offer outstanding value for money.

I extend my thanks to the National Board for setting the strategic direction for ALPMA, to our contractors for bringing that strategy to life, and to our committee volunteers for working with us to continue delivering on our promise to members.



**Warrick McLean**  
ALPMA President





## Membership

When you join ALPMA, you become part of a close-knit community of like-minded people working in law firms and legal departments in Australasia. ALPMA helps members to develop their core management skills and build their knowledge across multiple professional domains. Everything we do is designed to deliver on our promise to members.

During the year, ALPMA evaluated its offering to members and in consultation with the board, committees and contractors, determined it was time to introduce a new membership and pricing structure to better reflect the value of membership. Firms that support multiple memberships (3+) are now offered a sliding discount off the standard membership price - up 30% off for 10+ members.

To support the new membership structure, ALPMA invested in the development of a

new member portal to better manage member and firm data, and allow for the new multiple-member pricing across all platforms including online renewals and join forms.

ALPMA also introduced the category of **Associate of ALPMA** for those who are not eligible for full ALPMA membership. This includes legal educators, students, retired legal practice professionals and those who have moved out of the industry but wish to remain involved.

ALPMA membership continues to offer great value for money. The annual membership price includes 10 learning and development seminars and up to 6 national webinars per year, in addition to free access to more than 100 seminars on demand, online learning resources, and industry research to help firms benchmark their financial performance and compensation strategies against like firms.





## Membership

### Free Guest Pass for eligible non-members

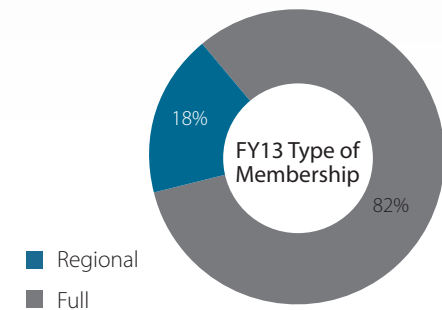
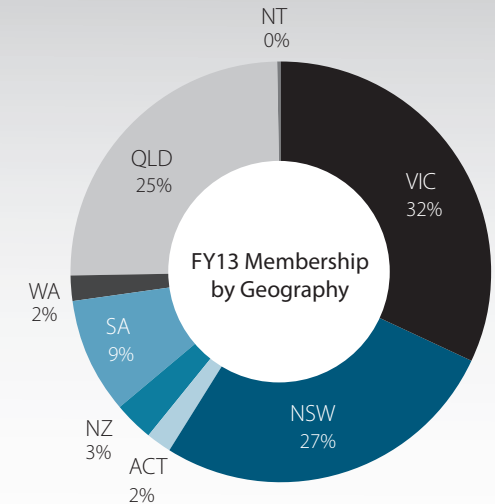
ALPMA expanded its free guest pass offer to allow non-members the opportunity to experience all that ALPMA has to offer for 30 days. The free guest pass entitles eligible non-members to attend an ALPMA webinar or seminar for free, plus the ability to explore Access ALPMA free for 30 days. The free guest passes have been used extensively over the year and this initiative is a key tool to drive membership growth.

### Membership Growth

ALPMA's membership continued to grow during 2012-2013 with a 9% growth on the previous year, bringing our total membership to 644.

### Expansion to WA

Earlier this year, ALPMA expanded into Western Australia, with the formation of a new local Committee in WA. ALPMA's first WA networking event was held in February 2013, where members and potential members came together to discuss and share plans for ALPMA in WA. The new WA Committee, led by Lisa McCarthy from IRDI Legal, is a vibrant and energetic group who are committed to growing ALPMA in WA. They intend running four events and a Christmas party in Perth during FY 2014. They are ably supported by the SA Branch, led by Robyn Clissold from Andersons Solicitors, who has worked tirelessly to ensure the success of our expansion into WA.



## Learning & Development Program

### Monthly lunchtime seminars

The lunchtime seminars conducted in Melbourne, Adelaide, Brisbane, Perth and Sydney continue to provide a strong foundation for ALPMA's learning and development program for our members – and a fantastic way to network with industry peers and leading suppliers.



Well done to each of our our State Branch Committees and Secretariats who continue to put together an engaging and inspiring program of events to help members develop their leadership skills and management expertise across multiple professional domains – from HR to finance, IT, business development and marketing.

These events would not be possible without the generous support of our National and State Corporate Partners, whose financial backing means we can continue to offer a very high quality seminar program free of charge for members.

### National webinar program

In 2012-2013 ALPMA conducted 6 webinars on a range of key topics related to HR, Finance, Practice Management and Professional Development in February 2013. ALPMA rolled-out a new webinar platform that is more efficient to administer and use. The success of the webinar program is evident by the increasing number of members attending these events, and sharing this resource with others in their office. Attendance at webinars has increased over the year from 25 per event up to 100 for some events.





## National HR Workshops

In March 2013, ALPMA again ran successful HR Workshops in Sydney, Melbourne, Brisbane and Adelaide. Facilitated by industry leading HR consultant Kriss Will, the workshops featured an expert panel of HR practitioners and employment lawyers and focused on hot topics for HR legal professionals. The feedback from attendees of the 2013 workshops was very positive. This is Kriss' last year of facilitating these workshops and we thank her for her outstanding contribution.



## ALPMA National Summit

The 2012 ALPMA National Summit was held on 14-15 September at the Sofitel Hotel in Brisbane, and attracted a record 200 delegates from Australia and NZ and the biggest trade exhibition ever.

The theme "Change & Growth: Leading Your Business" directly addressed the key issues facing legal practice management professionals in 2012, and provided tools to help delegates successfully navigate a rapidly changing industry and business environment while achieving profitable business growth.



Ari Kaplan (Kaplan Advisors USA) headlined the event which also featured practical and engaging presentations from Steven Levy (USA Lexicon), Sean Larkan (Edge International), Anna Byrne (NeuroPower), Anthony Bell (Bell Partners), Dr Neil Oakes (FMRC Legal) and many others.

The ALPMA National Summit continues to develop its reputation as the premier event in the legal management calendar in Australia. Thanks to our major 2012 Summit partners for their generous support.

Platinum Partner:



Official Document Solutions Partner:



Gold Partners:



Official Distribution & Mail Partner:



## Online Services

### ALPMA Website

The ALPMA website continued to be fine-tuned during the year to improve look and feel, navigation as well as upgrades to ACCESS ALPMA – the member only area of the ALPMA website which features:

### Seminars On Demand

Each of our local seminars and webinars are recorded and made available on-demand for free to members who have missed their local event – or who are interested in hearing the presentation from another State. The Seminars on Demand library was re-organised and expanded during the year, with over 30 new seminars added to the library. There are now more than 100 seminars in this online resource, providing a valuable source of professional development for our members and their firms.



## Member-Only Deals

Our Partners put together a great range of special deals exclusively for ALPMA members. This year's deals included discounts on courses from UNEP, the College of Commerce & Management, the Law Firm of the Future Forum and Ritchie Business Solutions, great deals on Christmas wine packs from Kilikanoon Wines to free personalised stickers from Gecko Print, a free audio book and much more!

## Job Bank

The online ALPMA Job Bank allows members to post a job free of charge on the ALPMA website and generates a significant number of hits each day. During 2012–2013 over 25 jobs for legal practice management professionals were posted on the site by members and non-members. We are planning to upgrade this service to members, including job alerts in 2014.

## Member Directory

The new ALPMA Member Directory in ACCESS ALPMA helps members connect and share information with other ALPMA members, see what firms are represented and who else is a member. The Directory will be reorganised and expanded in FY14.

## Online Membership Services

Members can now update their details, reset their passwords and manage their membership online. This year, most of our membership renewals were completed online. Our online registration process for events has also been significantly improved.



## Becoming a Respected Voice

ALPMA has worked hard this year to build its social media presence, a key plank in our strategy to become a respected voice of the industry.

In July 2013, ALPMA launched its new blog "A Survival Guide for Legal Practice Managers," to provide a regular source of information, opinions and advice specifically for managers at law firms. The blog contains regular input from members, industry experts and partners.

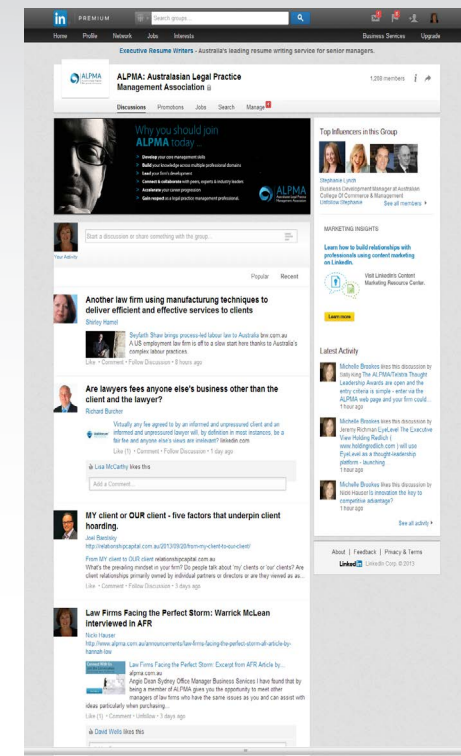
To date, more than 60 contributors have provided guest posts on topics ranging from performance management, strategic planning, innovation and client services. Subscribers receive these posts direct to their inbox, providing a weekly source of inspiration and new ideas!

These weekly blog posts have also provided an ongoing source of fuel for our social media strategy, which has focused this year on LinkedIn and to a lesser extent, Twitter and Facebook.

We now have more than 1200 members in the ALPMA LinkedIn Group, which provides a fantastic forum for members to share interesting articles, ask questions and discuss industry issues. Membership of the group is restricted to current members, eligible non-members and our partners, which helps ensure focused, quality discussions.

We have also been posting regular updates on ALPMA activities in other legal LinkedIn Groups and on our LinkedIn Company page, and this has been helping build ALPMA's profile across the sector.

Our Twitter presence has also grown, and we expect this to become increasingly important as more firms embrace this medium. For the first time this year, we set up a Facebook event page for ALPMA Summit, and we will continue to expand this over time. Thanks to everyone who has engaged with ALPMA via social media this year!



## ALPMA Legal Industry Research

### ALPMA Australian Legal Industry Salary Survey

The ALPMA Australian Legal Industry Salary Survey, kindly sponsored for the second year by Legal People, was conducted in March 2013. This annual survey provides a detailed breakdown of salaries paid for more than 60 administrative, managerial and legal positions at law firms across Australia. It also includes information on employment benefits and bonuses, anticipated salary increases and firm recruitment intentions for the next 12 months.

More than 200 companies participated in the 2013 survey, making it the most comprehensive independent study of salaries paid at law firms in Australia. This year's results gained media exposure in mainstream media publications such as The Australian and in Lawyers Weekly.

### Legal Industry Financial Performance Benchmarking Study

The ALPMA Legal Industry Financial Performance Benchmarking Study, conducted in conjunction with Crowe Horwath in 2012, provided a fascinating insight into the financial health of the legal industry. 95 firms from Australia and NZ participated in this year's survey - up from 60 participants the previous year.

The annual Benchmarking Study enables law firms to compare the financial health of their practices using Crowe Horwath's proprietary benchmarking tool, Open Measures.

### Hot issues in HR Survey

ALPMA conducted the Hot Issues in HR for 2013 Survey to provide a snapshot of the hot issues in HR facing legal firms in Australia. This is the second year that the survey was conducted and the results provided excellent input for the ALPMA National HR Workshops held in March.

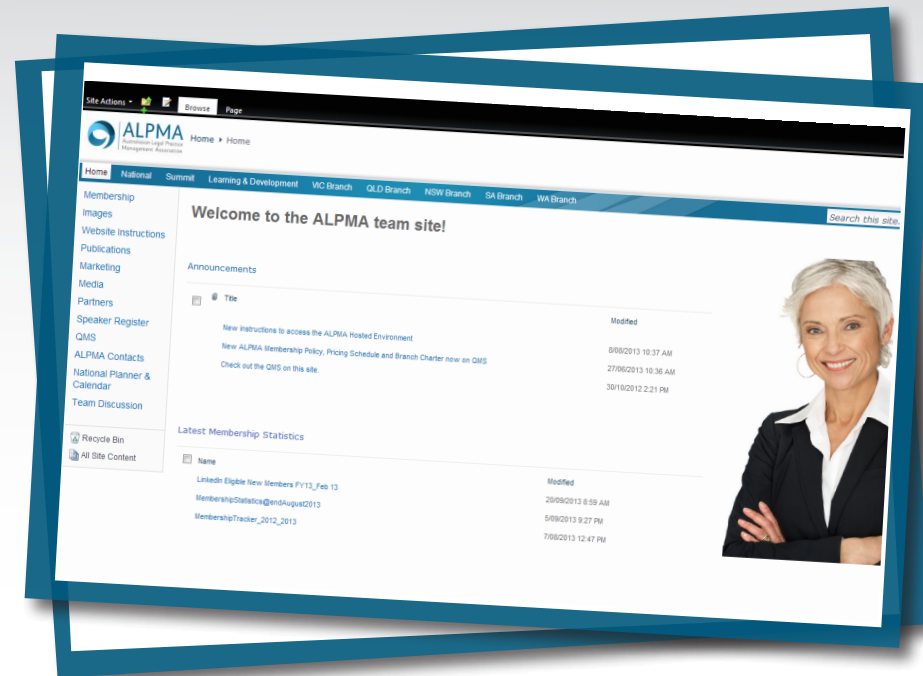


## Build a Strong Organisation

### ALPMA Hosted Environment

During 2012-2013, the National Board evaluated its operating environment and invested in a new platform to facilitate the storing and sharing of information for ALPMA. This “virtual” operating environment fully supports ALPMA’s team of contractors and Board/Committee volunteers, and provides an improved way of communicating and collaborating across the organisation. All contractors, Board and Committee members have access to the hosted environment via a secure username and password.

One of the key benefits of the new environment is the ALPMA Team Site (Intranet) which hosts key information for the National Board and State Committees. The establishment of a Quality Management System in the Team Site has allowed ALPMA to document many processes and procedures for the organisation, and make these readily accessible to all users.





## National Board

The ALPMA National Board is comprised of elected members from each State Branch Committee as well as board nominated representatives. The National Board continues to meet monthly by teleconference and holds two face to face meetings in Melbourne each year. The Board is fully supported by the Operations Manager, Marketing & Business Development Manager and National Bookkeeper.



**President**  
**Warrick McLean**  
Coleman Greig  
Lawyers (NSW)



**Vice President**  
**Lisa Sikorski**  
Septimus Jones  
& Lee (VIC)



**Treasurer**  
**Andrew Barnes**  
Sladen Legal (VIC)



**National Learning & Development Chair**  
**Mary Hockaday**  
Vincents



**Company Secretary**  
**Valmai Vickers**  
Ryan Carlisle  
Thomas (VIC)



**New Projects**  
**Anthony Bleasdale**  
Maurice Blackburn  
(NSW)



**Sally King**  
Carroll & O'Dea  
Lawyers (NSW)



**Jovan Bogdanovic**  
Shine Lawyers  
(QLD)



**Carey Waterworth**  
Bennett & Philp  
(QLD)



**Tobias Crush**  
Piper Alderman  
(SA)



**Robyn Clissold**  
Andersons Solicitors  
(SA)

## National and Branch Committees

ALPMA has four Branch Committees (QLD, NSW, VIC, SA), a WA State Committee, a National Learning and Development Committee (made up of nominated representatives from the Branch Committees), and a dedicated ALPMA National Summit Committee. Each Committee comprises up to 10 elected members who volunteer their time to help with the implementation of ALPMA's activities. Each Committee is fully supported by a dedicated Secretariat.



## ALPMA Corporate Partners

We thank our 2012-2013 Corporate Partners, whose generous support helps us to deliver a quality National and State learning and development program for members, while keeping membership fees low.

### National Corporate Partners



### State Corporate Partners

#### Victoria

Legal People  
Dunsford Financial  
Planning  
Macquarie  
Relationship Banking

#### New South Wales

Red Rain  
Crowe Horwath  
St George Bank

#### Queensland

Crowe Horwath  
Easi-File  
GBC Australia  
(NeoPost)

#### South Australia

McArthur  
Paytec  
Quick Corporate

## Looking Ahead

Each quarter, a comprehensive organisational performance summary is produced for the Board, reporting against deliverables in the 2012-2015 Strategic Plan. The ALPMA Board assesses all projects based on these key deliverables.

The agreed approach moving forward into FY14 is one of consolidation with respect to projects and resources. The focus will clearly be on ensuring that we continue to do what we do well for the maximum benefit of members, and the future sustainability of ALPMA.

One key project for the next year is the development of a comprehensive Learning and Development (L&D) strategy for ALPMA.

The goals of this strategy are to:

- Ensure ALPMA continues to deliver a high quality L&D program to deliver on our promise to members
- Support ALPMA's thought leadership agenda
- Improve accessibility for all members & support membership growth objectives
- Better leverage our existing content
- Optimise resourcing and cost required to deliver the program
- Generate additional revenue from L&D.

The development of this strategy is a highly consultative process, with the National L&D Committee, National Board and State Committees and secretariats all engaged in the process.

We look forward to the next stage in our journey, as we continue to grow and evolve as the key resource and leading voice for the legal practice management profession in Australasia.

# FINANCIAL REPORT FOR THE YEAR ENDED 30 JUNE 2013



The company had a trading deficit for 2012/13 of \$35,020. There is an obvious improvement on the prior year and this is due largely to the contribution from another successful Summit. Many expenses are investments with benefits in the medium term beyond the current financial year. Our website development and partnership programs are two obvious examples. The outlook for 2013/14 is challenging and the Board has ensured the budget process has focussed on improving the trading position to be at break even for the year.

ALPMA retains a very positive outlook. These key balance sheet items show the resources accrued at 30 June and are a snapshot of the exciting start to the new 2013/14 year, with more than \$500,000 of income already committed to pre-year end.

## Financial Reports 2012-2013

### Balance Sheet

	2013	2012	%Var	%Var	
Cash at bank	561,845	547,286	14,559	2.7%	Cash received in advance for next for next (2013/14) financial year
Receivables	253,804	191,098	62,706	32.8%	commitments from new partners/ members/Summit
Income in advance	377,644	316,408	61,236	19.4%	2013/14 members and partners
Conference in advance	146,412	118,067	28,345	-	2013 Sydney Summit commitments
<b>Surplus/(Deficit)</b>	<b>-35,020</b>	<b>-69,943</b>	<b>34,923</b>	<b>50%</b>	

# FINANCIAL REPORT FOR THE YEAR ENDED 30 JUNE 2013



The full ALPMA financial report for the year ended 30 June 2013 is available at [www.alpma.com.au/My-Membership/member](http://www.alpma.com.au/My-Membership/member).

Australasian Legal Practice Management Association is a not-for-profit company limited by guarantee.

	2013	2012	\$Var	%Var	
<b>INCOME</b>					
Memberships	182,122	174,744	7,378	4.2%	steady in challenging times
Sponsorship	230,291	176,901	53,390	30.2%	excellent, underpins ALPMA's relevance
Conference	422,251	309,036	113,215	36.6%	excellent, Summit continues to grow
Workshops/Seminars	59,407	66,975	-7,568	-11.3%	members attend free; more members less new revenue
Other	24,722	27,459	-2,737	-10.0%	
	<b>918,793</b>	<b>755,115</b>	<b>163,678</b>	<b>21.7%</b>	
<b>EXPENSES</b>					
Conference	333,876	218,563	-115,313	-52.8%	offsets growth in income, margin solid
Secretarial	251,194	255,542	4,348	1.7%	consolidation after transition in 2012
BD & Marketing	100,855	101,029	174	0.2%	consolidation after transition in 2012
Workshops/Seminars	70,580	83,892	13,312	15.9%	savings delivered by contractors, net loss
Other	197,308	166,032	-31,276	-18.8%	
	953,813	825,058	-128,755	-15.6%	
<b>Surplus/(Deficit)</b>	<b>-35,020</b>	<b>-69,943</b>	<b>34,923</b>	<b>50%</b>	



For more information about ALPMA

Email: [info@alpma.com.au](mailto:info@alpma.com.au)

Visit [www.alpma.com.au](http://www.alpma.com.au)

Call: 1300 692 256

**ALPMA.** **ADDING VALUE TO THE BUSINESS OF LAW.**