



Annual Report 2014-2015



Grow Your Firm



Create Sound
Strategy



Ensure Efficient
Operations



Develop and
Manage People



Improve Firm
Profitability



Become a
Better Leader



ALPMA. Adding Value to the Business of Law.

The Australasian Legal Practice Management Association, (ALPMA), is the peak body representing managers and lawyers with a legal practice management role. ALPMA provides an authoritative voice on issues relevant to legal practice management.

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ALPMA's Vision Mission & Values

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.



President's Report

In reaching the end of our 2012-2015 strategic planning cycle, I look back with pride on all that we have achieved over the last three years. It has been a time of significant growth for ALPMA, not only in terms of markets and membership, we have also grown as an organisation to deliver a comprehensive learning and development program, a broad legal industry research program and significant networking and online opportunities for members.

The implementation of a new learning and development program for ALPMA was a key highlight of the year. With the introduction of our Learning & Development Framework and launch of the Leading Your Firm Program, we delivered over 70 professional development events attended by over 2,000 legal practice managers.

We also launched the ALPMA On Demand Learning Centre which is a great source of quality content for law firm managers and leaders.

The 2014 ALPMA Summit "Thrive & Prosper" held in September in Melbourne attracted a record number of delegates and trade.

Membership grew in 2014 by 23% which is the highest growth on record. This growth was fuelled by ALPMA's successful expansion to Western Australian and New Zealand, where we have made significant progress in establishing a local presence and delivering on-the-ground events.

It's an exciting time for ALPMA and the profession, as we continue to leap forward in an ever changing and increasingly global legal industry. To address the challenges and opportunities, the ALPMA Board has recently launched the 2015-2018 Strategic Plan. This new plan will allow us to build on our current initiatives, establish strategic relationships and take a global view of the legal practice management profession, while keeping our promise to members at the core of everything we do.

On behalf of the Board of Directors, I extend a sincere thank you to all of our members who generously give their time and expertise to serve on committees across Australia and New Zealand. Without your significant contribution, ALPMA would not be in the position we are in today.

Finally, thanks to our dedicated team of contractors who work tirelessly to deliver our programs and services.

Here's to the next three years!



Andrew Barnes
ALPMA President

Growing membership



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.

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



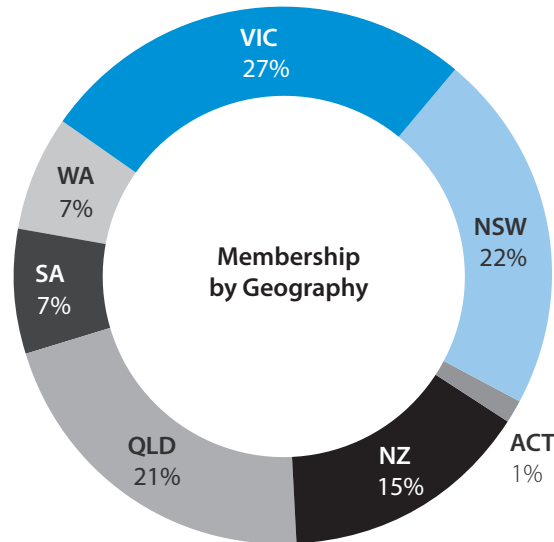
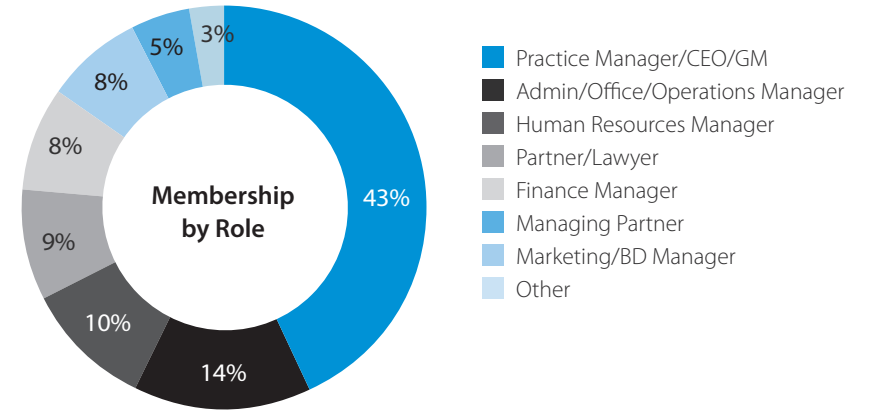
Growing membership

Our promise to members is at the core of everything we do at ALPMA and shapes our activities and deliverables. ALPMA has seen steady membership growth over the last three years and significant growth in the last year, with a 23% increase on the previous year.

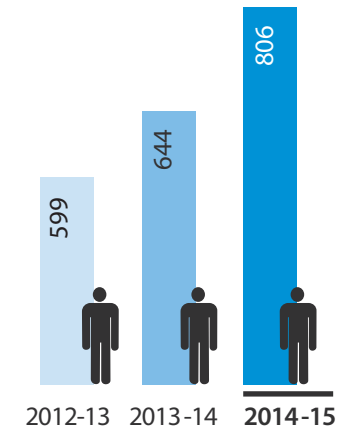
ALPMA in New Zealand & WA

Following the official launch of ALPMA in New Zealand in March 2014, growth in membership has been phenomenal – we now have over 120 New Zealand members, an active NZ Committee supported by a local secretariat and a program of events being held on-the-ground in Auckland, Christchurch and other regional locations. This growth has been supported by local organisations such as NZ LAW and Lawlink, plus various practice management groups around the country.

Membership in Western Australia also grew significantly during the year thanks to a dedicated Committee and Secretariats who are keen to establish the ALPMA brand and benefits in the west. We successfully held 6 events on the ground in Perth last year and there are plans to develop local workshops and networking opportunities.



Membership Growth





ALPMA's Legal Practice Management Learning & Development Framework



Grow Your firm

- Business development & sales
- Customer satisfaction & retention
- Marketing & communications
- Mergers & acquisitions



Develop and Manage People

- Recruitment, retention & engagement
- Performance management
- Remuneration
- Succession planning
- Diversity
- Career development



Create Sound Strategy

- Leadership, team & cultural development
- Business strategy & planning
- Competitive analysis & intelligence
- Legal industry trends
- Legal business models



Improve Firm Profitability

- Financial performance analysis & communication
- Non-financial performance drivers
- Resource planning
- Working capital management
- Pricing



Ensure Efficient Operations

- Technology & automation
- Process improvement & quality management
- Facilities management
- Project, change & risk management
- Document & knowledge management



Become a Better Leader

- Leadership skills development
- Communication & interpersonal skills
- Negotiation & conflict management
- Resilience



Learning & Development Program

New Leading Your Firm Program

This year, ALPMA launched its innovative new Leading Your Firm program with the generous support of Principal Partners, Thomson Reuters and BigHand, and Regional Partners, LexisNexis, BOAB IT and CommArc.

The program was developed to meet the specific needs of law firm leaders at smaller and regional law firms by our National Learning & Development Committee, guided by research conducted with ALPMA's smaller and regional members. Participation in the program is free for ALPMA members or \$99 (including GST) per event for eligible non-members.

The program kicked-off with a compelling webinar on pricing strategy conducted by Dr George Beaton, Executive Chairman, Beaton Research + Consulting. Other speakers, including Dr Peter Lynch (dci Lycon), Dan Toombs (Fast Firms), Kate Hart (Kate Hart Consulting) and John Swete-Kelly (Crowe-Horwath), provided practical advice and strategies to help participants successfully lead and manage their law firms in a changing legal landscape.

The annual program included five webinars and three live-streamed events, where members could elect to watch the presentation online or gather with other law firm leaders at 18 regional hubs across Australia and New Zealand.

ALPMA would like to sincerely thank all law firms who offered their facilities to serve as a hub in their region. The first live-streamed event was a big learning experience for ALPMA and our regional hub hosts, but after some initial hiccups, the program ran smoothly, and regularly attracted more than 120 attendees per event.



Learning & Development Program

New Leading Your Firm Program (continued)

Each event in the program was recorded and made available for free to members from the ALPMA Learning and Development Centre, and for a small fee for non-members. Over time, content from this program will become a valuable online learning and development resource for smaller and regional law firms.

Michelle Brookes, ALMA's Queensland Secretariat, took on the additional role as ALPMA's Learning & Development Coordinator, and did an outstanding job managing the launch and implementation of the Leading Your Firm program in FY15.

Moving forward, ALPMA will continue to focus on growing the reach of this program to ensure more firms benefit from participation.

Practice Management Seminars

During 2014-2015, ALPMA delivered 50 Practice Management seminars at lunch-time in Melbourne (10), Sydney (10), Brisbane (10), Adelaide (10), Perth, (4) Auckland (4) and Christchurch (2).

Free for our members, these events covered topical subjects spanning ALPMA's Legal Practice Management Learning and Development Framework (see page 7), and were presented by dynamic speakers with deep subject matter expertise and extensive legal industry experience.

For the first time this year, ALPMA ran quarterly practice management seminars in NZ and Perth, supported by our NZ and WA Committees led by Sheryll Carey (NZ), Lisa McCarthy and Emma Elliot (WA). Over time, ALPMA will increase the number of practice management seminars in these markets, with the aim of offering 10 per annum in each by FY17.

ALPMA's practice management seminars continue to be well-attended by members, law firm managers and leaders, and well-supported by our FY15 Corporate Partners.

These seminars provide a highly-valued opportunity for members and partners to connect with each other, share their professional experience, ask questions and offer advice. Being part of a collaborative, supportive community of law firm managers and leaders is what many members value most about their ALPMA membership.

Thanks to each of our State committees for their efforts in putting together a compelling and varied practice management seminar program in FY15, and to each of our local Secretariats for the wonderful job they do in managing our seminars and supporting ALPMA's local committees each year.

Local Events

During the year, ALPMA also conducted various state-specific events such as the well-attended VIC HR Workshop, QLD Regional Forums, NSW Awards, WA networking events and SA breakfasts. These local events underline ALPMA's ability to deliver a nationally aligned L&D framework without losing sight of the unique objectives and requirements of our local branch network.



Thrive & Prosper

2014 ALPMA SUMMIT | Melbourne 27- 29 August 2014 Crown Convention Centre

The 2014 ALPMA Summit “Thrive and Prosper” was held on 27-29 August at the Crown Conference Centre in Melbourne, and brought together more than 270 senior legal management professionals with world-class industry experts and leading industry suppliers for an intensive two days of professional development and networking.

ALPMA Summit



For the first time delegates were offered the opportunity to attend optional pre-Summit workshops on Wednesday afternoon. Conducted by Craig Rispin and Julie Savarino, these workshops were a huge success and will be continued at future Summits.

ALPMA also live-stream broadcasted most Summit sessions for the first time in 2014, allowing those who could not attend in person to watch the presentations live and online. Several firms set up mini-Summits in their boardroom, sharing the Summit experience across the firm.

Most sessions were also recorded, and made available for purchase on-demand following Summit, from the ALPMA On-Demand Learning Centre. This proved to be a wonderful way for delegates to share the knowledge gained at Summit back in the office and help them pave the way to implement new initiatives based on these learnings in their firms.

Thanks to our Principal Summit Partner, LexisNexis for their generous, on-going support and to all of our partners and exhibitors who made this event such a success.

2014 ALPMA Summit Program highlights

- Your Firm in 60 Seconds - Developing a Clear Positioning Strategy for your Law Firm, by US-branding expert, Tim Williams
- Thriving and Prospering in a Bigger Australia, by demographer Bernard Salt
- Designing and Leading Change for Thriving Law Firms, with Gretel Bakker from Performance Frontiers
- How to Make the Most of LinkedIn for Lawyers and Law Firms, by Julie Savarino from Business Development Inc
- Women as Leaders and Leading Lawyers by former Attorney General, The Hon. Nicola Roxon

Summit Partner



Summit Major Partners



Online services



ALPMA Website

ALPMA implemented its new website in July 2014, featuring fully responsive design to support access from mobile devices, and content classified by ALPMA's Learning & Development Framework – making it much easier for members to find the information and resources they are looking for.

In FY15, ALPMA also introduced video content to its site, featuring a selection of members discussing the things they value about their ALPMA membership. Thanks to everyone who bravely volunteered to participate in this project.



ALPMA On-Demand Learning Centre

The ALPMA On-Demand Learning Centre contains a growing library of live-recordings of the expert presentations given at ALPMA's practice management seminars, Leading Your Firm program, national webinars and Summit.

This year, ALPMA added more than 50 new presentations to the On-Demand Learning Centre, most of which can be viewed by ALPMA members for free. This gives our members (and their firms) unprecedented on-demand and cost-effective access to our entire learning and development program.

ALPMA continues to enhance this area, introducing new video snippets showing highlights from selected presentations to help showcase and promote viewing of these on-demand recordings.

ALPMA also developed a distribution partnership with Bulletpoints this year to promote our on-demand practice management content on their website. Further promoting and leveraging this valuable content is a key strategy for ALPMA moving forward.





Online services

Online Resources

The ALPMA website includes a range of on-line resources for the legal practice management community, including:

The ALPMA Blog: A Survival Guide for Legal Practice Managers

With a new post published every Tuesday and distributed direct to the inbox of members and subscribers, the ALPMA Blog “A Survival Guide for Legal Practice Managers” continues to provide a valued source of practical advice and insights on a broad range of relevant topics for legal practice managers and law firm leaders. Thanks to all of our guest-bloggers this year for their valuable contributions.

The blog weekly blog post also helps drive ALPMA's successful social media strategy.

Member-Only Deals

Our Partners put together a great range of special deals exclusively for ALPMA members. This year's deals included discounts on document storage, preparing resumes for tenders, legal marketing programs, and business development systems.

Job Bank

The online ALPMA Job Bank allows members to post a job free of charge on the ALPMA website and generates quite a bit of site traffic for ALPMA. During 2014-2015 over 20 jobs for legal practice management professionals were posted on the site. We are planning to expand this service in FY16 to include jobs wanted (members only) and job alerts for members.

Member Directory

This member-only resource provides an easy-way for members to contact each other.

Knowledge Bank

The ALPMA Knowledge Bank is an online library of information relevant to legal practice managers. This year we categorised the content in line with the new Learning & Development Framework, so that it is much easier to find the content you are looking for.

Business Directory

The Business Directory provides an on-line listing of legal industry suppliers.

How Can We Help You Today?

- Grow Your Firm
- Improve Firm Profitability
- Develop & Manage People
- Ensure Efficient Operations
- Create Sound Strategy
- Become a Better Leader
- Become a Member
- Become a Partner
- Register for an Event

Call **ALPMA** 1300 692 256



Become a respected voice

Growing Online Community

ALPMA's LinkedIn Discussion Group continues to provide a great forum for members, eligible non-members and ALPMA partners to share news, ask questions and discuss topical issues. We reached more than 1,500 members in this Group this year (and this continues to grow).

ALPMA also ramped-up its Twitter presence this year, reaching more than 1,000 followers and steadily improving engagement – particularly during Summit as we live-tweeted from many sessions for the first time, using #ALPMASummit. Most popular on our Facebook page were the photos from Summit.

This year, we also launched our new YouTube Channel, featuring member testimonials and snippets of presentations from across our Learning and Development program.

2014 ALPMA/Telstra Thought Leadership Awards

Hive Legal, a start-up virtual law firm, was crowned the 2014 ALPMA/Telstra Thought Leadership Award winner for their innovative legal business model, ahead of finalists AdventBalance, Swaab Attorneys and PD Lawyers, at the ALPMA Summit Gala dinner in Melbourne on Thursday 28 August.

The ALPMA/Telstra Thought Leadership Awards shine a light on innovative projects and initiatives conducted by firms across the legal sector over the last 12 months in response to the changing legal landscape. This was the second year the Awards have been held and sponsored by Telstra.



**Thought
Leadership
Awards**
2014 Finalist



IT'S HOW
WE CONNECT



2014 Finalists

Pictured left to right: Jodie Baker, Managing Director, Hive Legal; Will Irving, Group Managing Director, Telstra Business; Jamie Prell, Legal Director, AdventBalance; Bronwyn Pott, Chief Executive Officer, Swaab Attorneys; Mel Cox, Director and Chief Executive Officer, PD Law; and Lisa Sikorski, ALPMA Victoria Chair and General Manager, Septimus Jones & Lee.



ALPMA Legal Industry Research

Research into the Changing Legal Landscape

The annual ALPMA/LexisNexis research investigates the impact of change on the Australasian legal profession, including how firms have responded to the changing legal landscape to date, what firms plan to do in the next 12 months, and how prepared the legal industry is to survive and thrive under in the 'new normal' environment.

122 respondents from law firms across Australia and New Zealand participated in the 2014 research, conducted via on-line survey in June, 2014. This is the second year the survey has been conducted. The full report was launched at the ALPMA Summit, and made available for download for free from the ALPMA website. This research provided valuable information on the changes impacting the legal industry, how firms are responding and intentions for the year ahead.

Legal Industry Salary & HR Issues Survey

Conducted in March each year, the ALPMA Legal Industry Salary and HR Issues Survey is the most comprehensive, independent report on salaries for all roles at law firms in Australia and New Zealand, helps firms benchmark their compensation strategy to like firms and provides valuable insight on the critical HR issues and challenges facing law firms.

For the first time in 2015, ALPMA conducted two surveys – one for Australia, sponsored by Rusher Rogers HR Solutions, and one for New Zealand, sponsored by McLeod Duminy Careers.

The 2015 ALPMA/Rusher Rogers Australian Legal Industry Salary and HR Issues Report provided information on salaries and benefits for 70+ roles at Australian law firms. In 2015, 254 Australian law firms from across Australia, employing 9,239 people completed the survey.

The inaugural 2015 ALPMA/McLeod Duminy Careers New Zealand Legal Industry Salary and HR Issues Report provided information on salaries and benefits for 60+ roles at New Zealand law firms. 62 New Zealand law firms from across the country, employing 1,836 people, completed the survey.





Legal Industry Financial Performance Benchmarking Study

The ALPMA Legal Industry Financial Performance Benchmarking Study, conducted in conjunction with Crowe Horwath, enables law firms to compare the financial health of their practices using Crowe Horwath's proprietary benchmarking tool, Open Measures.

More than 100 firms across Australia participated in this year's study. Participants were invited to attend a free webinar to gain insights on financial trends and outlook for the legal industry.

Business Development & Marketing Benchmarking

In September 2014, ALPMA and Julian Midwinter and Associates launched new research benchmarking business development and marketing programs at Australasian law firms. The online research attracted more than 151 participants from 149 law firms across the region.

The "Taking the Pulse: Benchmarking Business Development & Marketing at Australasian Law Firms" research results showed that most Australasian law firms were struggling to develop an effective business development and marketing program – despite recognising that this is pivotal to achieving their firm's growth ambitions. The research findings helped law firms understand how their marketing and business development **investments, resources and processes** compare to similar firms and identify opportunities for improvement.

KEY GROWTH STRATEGY FOR LAW FIRMS



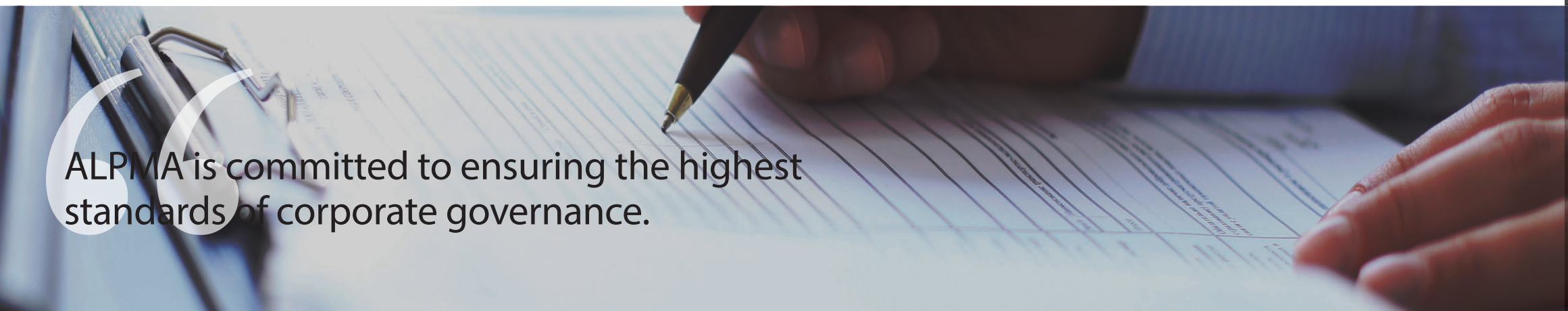
julian
midwinter
& Associates Pty Ltd

ALPMA
Australasian Legal Practice
Management Association

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Building a strong organisation



ALPMA is committed to ensuring the highest standards of corporate governance.

ALPMA is a not-for-profit company limited by guarantee. Subject to the Corporations Act, ALPMA operates under a Constitution which is available at alpma.com.au. ALPMA ensures the highest standards of corporate governance and is committed to the continual review and improvement of our governance structure, practices and procedures.

During the year, the following policies were developed/updated:

- Membership Policy and Pricing Schedule for Australia and New Zealand
- Branch Charter
- Appointment & Role of Board & Committees
- Summit Committee – Guidelines for selection & appointment
- Risk Management Policy

ALPMA successfully implemented Xero accounting software for managing financials, allowing for a secure cloud based financial environment that is more suited to our virtual operating structure.

To support our New Zealand Operations, ALPMA invested in upgrading the website and financial systems to support pricing and payments in New Zealand Dollars.

We also initiated a project to review ALPMA's IT systems with a view to consolidate and amalgamate these for future efficiencies.



National Board

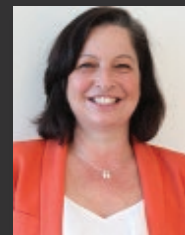
The ALPMA National Board is comprised of elected members from each State Branch Committee as well as board nominated representatives. The National Board continues to meet monthly by webinar and holds one face to face meeting each year.



President
Andrew Barnes
Sladen Legal (VIC)



Vice President
Valmai Vickers
Ryan Carlisle
Thomas (VIC)



Treasurer
Begonia Silvestre
Hunt & Hunt (NSW)



L&D Director
Mary Hockaday
Mary Hockaday
Consulting (QLD)



**New Projects
& Past President**
Warrick McLean
Coleman Greig
Lawyers (NSW)



Company Secretary
Susan Comerford
Cowell Clarke (SA)



Board Member
Tobias Crush
Piper Alderman (SA)



Board Member
Carey Waterworth
Bennett & Philp (QLD)



Board Member
Dion Cusack
K&L Gates



Board Member
Emma Elliot
Steinepreis
Paganin (WA)



Board Member
Sheryll Carey
Lowndes Jordan (NZ)

PREVIOUS DIRECTORS: Lisa Sikorski (until November 2014) & Jovan Bogdanovic (until May 2015)
Lisa McCarthy, WA was a Board guest until November 2014.



ALPMA Branches & Committees

ALPMA currently has over 60 member volunteers who generously give their time to ALPMA Committees. We currently have Branches operating in VIC, NSW, QLD and SA. We also have a Committee operating in WA (under the SA Branch) and in New Zealand (under the NSW Branch). Each Committee includes up to 10 members who volunteer their time to help with the implementation of ALPMA's programs at a local level.

The National Learning & Development (L&D) Committee is made up of nominated representatives from the Branch Committees and oversees the development and implementation of the L&D program for ALPMA. A dedicated Summit Committee also operates as a sub-Committee of the ALPMA Board.

We'd like to sincerely thank all of our volunteers for their significant contribution to ALPMA – they are a valued and integral part of our Association.

The ALPMA Team

ALPMA is a “virtual” organisation, staffed by a part-time dedicated team of contractors, working from home offices to deliver ALPMA's programs and services, support committees and members and help grow the organisation.

The National team includes Connie Finestone – Operations Manager, Nicki Hauser – Marketing & BD Manager, Heather Connell – Bookkeeper and Michelle Brookes in the role of National Learning & Development Coordinator (in addition to her role as QLD Secretariat). Fiona Croswell has recently joined the team as ALPMA Learning & Development National Manager.

Kerrie Billings (VIC), Sally Lowe (NSW), Jo Hood (SA), Angelique Cooper (WA) and Deb Shaw (NZ) continue to support their local committees.

ALPMA's structure continues to evolve to meet the ever expanding needs of the Association and its growing member base. Thanks to our contractors for their dedication, hard work and commitment to ALPMA.

ALPMA Partners



We thank our 2014-2015 Corporate Partners whose generous support is crucial to our delivery of a quality Learning & Development program, and networking opportunities, for members.

Corporate Partners



State Corporate Partners



Looking ahead



It's an exciting time for ALPMA and the legal industry, which is going through significant change bringing both challenges and opportunities. To respond to this change ALPMA's Board recently launched the 2015-2018 strategic plan which aims to build on the progress made over the last three years, along with some ambitious aims and targets by 2018.

The focus for the next three years is on building strategic relationships and taking a global view of the legal practice management profession, while staying true to our promise for members.

ALPMA's strategic priorities for 2015–2018 are designed to support continuous improvement in the value we offer to our growing membership base and to expand our position as a respected voice on the “business of law” in the Australasian legal community.





Financial summary 2014-2015

ALPMA incurred a small trading deficit for 2014/15, which was an improvement on the previous 3 years' results. The Board remains committed to increasing reserves while still delivering growth and fulfilling our commitments to our members and partners.

The significant movements in cash and receivables as line items, net each other off – with an increase of \$67k from the same time last year. Although the Conference in advance income was down on the same period last year it is pleasing to note that we exceeded our targets and had 312 delegates to Summit 2015.

Financial Summary 2014-2015

| | 2015 | 2014 | \$ Var | % Var | |
|--------------------------|---------------|----------------|---------------|---------------|---|
| Cash at Bank | 565,457 | 740,129 | -174,672 | -23.6% | Cash received in advance for next (2015/16) financial year |
| Receivables | 367,746 | 169,714 | 198,032 | 116.7% | Commitment from new partners/ members/Summit registrations |
| Income in Advance | 579,125 | 478,647 | 100,478 | 21.0% | 2015/16 members and partners |
| Conference in Advance | 118,234 | 174,735 | -56,501 | -32.3% | 2015 Gold Coast Summit registrations |
| Members Funds | 140,348 | 143,047 | -2,699 | -1.9% | Net equity position of the Association |
| Gross Income | 1,365,185 | 1,078,582 | 286,603 | 26.6% | |
| Operating Expenses | 1,367,884 | 1,123,975 | 243,909 | 21.7% | |
| Surplus/(Deficit) | -2,699 | -45,393 | 42,694 | -94.1% | |

The full ALPMA financial report for the year ended 30 June 2015 is available at www.alpma.com.au – Member area, member news.

