

# LEGAL MANAGEMENT

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## LI FEATURE

LEGAL INDUSTRY/BUSINESS MANAGEMENT

## Unified Approach

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

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.



**VALERIE A. DANNER**

*Senior Managing Editor, Legal Management*

several years, ALA has been working on developing a taxo standards make a big difference, as is evident with the Am Procedural Terminology (CPT) — a universal coding system these codes went a long way to streamline reporting withi aims to do the same for back-end legal operations.

Nearly three years after the first version launched, Version already in use. In 2018, ALA put the UPBMS to work in practice by developing its *Job Description Toolkit*, for instance. This means

“The UPBMS being put into action is exciting to see,” says of ALA. “It’s been such a dedicated effort by ALA volunteers in their own practice places so that the legal industry can work from a common language.”

Laura R. Wickliff, PHR, SHRM-CP, Chief Human Resources Officer at the University of Arizona, was on the Job Description Toolkit project team. She and other team members provide examples of job descriptions in several categories.

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“Once I familiarized myself with the UPBMS, the process of developing new job descriptions was much easier to apply clear and consistent criteria when creating a new job description.”

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“I used the UPBMS codes as part of the job descriptions to define duties for each job description,” says Wickliff. As she worked on the project, she found how the codes streamlined the process. “Once I familiarized myself with the codes, it simplified the process of developing new job descriptions. It’s important to use 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 Jennifer Mech, HR Officer at Goldberg Kohn, Ltd., in Chicago, Illinois, and the University of Arizona. “Version 2.0 is an enhancement that includes revisions to the UPBMS that reflect literally thousands of small editorial revisions. No exception,” says Mech.

The latest update reflects several significant improvements:

- **More Detailed Organization:** Version 2.0 has the code set for Legal and Support. “In the previous version, legal activities (performed by paralegals and other paraprofessionals) were contained in the Support. Legal activities are now in a dedicated branch, and the entire code set,” says Mech.
- **Improved Logical and Consistent Structure:** The Classification System was reorganized and incorporated into other existing classifications. Mech says that this change required considerable effort by ALA’s Standards Review Committee, which is made up of legal professionals tasked with overseeing the UPBMS, but the result is a more logical structure.
- **Enhanced Classification for Senior Leadership:** The Lead Classification System was significantly revised. “Our previous version had only light touch activities performed by senior leadership,” says Mech. “While the classification system has been significantly improved.”

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

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It’s not just legal management professionals seeing the benefits. Bob Wangler, President of BigHand North America, has more than 20 years of experience on the side of the legal industry and also sits on the Standards Review Committee. “I’ve heard from law firm clients that they are looking for the same as their peers in the industry. The challenge has always been getting a set of universally accepted standards governing the data to make it more meaningful,” says Wangler. “The industry has evolved to a point where we have billing standards, but there remains a tremendous gap regarding how business partners can embrace these standards, integrating them into their solutions. If we can help drive the initiative forward.”

That’s what the UPBMS aims to do — provide that standard and help business partners implement and maintain successful management and operations.

use of a common language and approach to legal support accurately capture the costs associated with matters, so firms associated with delivering their services.

### WHAT THIS MEANS

Mech is pleased with the initial rollout. As the first effort to the UPBMS has received a positive response from the industry effort, law firms and legal administrators are learning how administrative initiatives,” says Mech. He says after the rollout focus on educational and promotional efforts to increase adoption.

He also looks forward to it being adopted for more uses. In the UPBMS, because it standardizes headings and definitions to adapt to their firm’s format. Mech says that there are even using the UPBMS to perform job analysis and similar activities indicators (KPIs) and other performance metrics.

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“Our previous version had only lightly reviewed activities performed by senior leadership. Now that the work to be done, this section has been

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From the business partner side, Wangler says he sees implementation seeing more and more interest from clients as they seek better businesses, to get to a standardized view. Now that the company I think this will move forward quickly.”

Plus, it just makes good business sense. “I think the implications Wangler says. “Naturally, from a commercial standpoint, it gain competitive advantage by being part of the solution.

### ABOUT THE AUTHOR

Valerie Danner is the Senior Managing Editor of *Legal Management* journalism and has been writing and editing for various publications.

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## **WE WANT YOUR FEEDBACK**

The comment period for version 2.0 of the UPBMS will open soon. Just visit <https://upbms.alanet.org/> to send us your thoughts.

Then we just have a handful of notes about the ads. I'm working on the FTP shortly!

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