

## THE FALL EDITION

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### A Message from the President



As fall begins and winter waits around the corner, let us look back and give ourselves a pat on the back! 2021 has seemed like a roller coaster ride of epic proportions. Because of the pandemic, we have experienced unprecedented challenges in our professional as well as personal lives. We have experienced and overcome loss, celebrated milestones in ways we never thought possible, and have risen to the challenge of innovation (yay, Zoom!).

We have survived one of the toughest years as a Chapter, yet we were able to thrive. Working together, we pivoted and embraced virtual education, and produced more educational sessions than ever! Our chapter participation for some of these events actually exceeded rates for in-person programs, and moving forward, we plan to pursue a hybrid format to engage as many members as possible.

After our year of isolation, I have to say it was wonderful to attend the in-person ALA National Conference in Austin, Texas in early October. The ability to be together with our peers and colleagues, and to become further educated on the business of law was inspiring. We will be sharing some of the information and ideas we took away from the conference with you all throughout the coming months.

Looking forward, we are excited to resume in-person activities and spend face-to-face time with our business partners at the annual Legal Expo to be

held at the Sheraton Valley Forge on November 18, 2021. We are also planning an in-person holiday dinner and hope to have as many members join us as possible. Speaking of the holidays, the order has been placed for our beloved Independence Chapter mousepads and every member should receive one by year end.

Let's face it – we are better together. I thank you all for your patience, commitment and flexibility as we have successfully navigated these trying times. I am grateful for the privilege of serving as your President and working alongside such a committed Board of Directors. Because of your dedication to Independence ALA, we look forward to 2022 with renewed energy, optimism and purpose. Thank you for sharing this journey with us!

Sandy B. Caiazza  
Marshall Dennehey  
Assistant Director of Administrative Services

## NEW MEMBER SPOTLIGHT

### MEET JAMIE HECKMAN *by Joan Wean*

Jamie Heckman is currently in a hybrid role in the Law Offices of Jennifer J. Riley, located in Blue Bell.

Jamie handles administrative tasks as well as supporting two attorneys. She is part of the management team where she oversees the legal staff (two paralegals, two administrative assistants, a billing coordinator and a receptionist). Additionally, she often acts as the liaison between the attorneys and Attorney Riley as she navigates both a case load of her own plus management of the office. Jamie has been Attorney Riley's assistant beginning when the office opened in Blue Bell in 2014 and has helped grow the firm in terms of size of people and offices and assisting with hiring/firing, onboarding and other administrative tasks. She is currently in the process of assisting with the opening of a second office in Wayne, PA.



Jamie started off in the legal field as a Receptionist. She was working at a restaurant and wanted to move on to a professional environment. Jamie applied for a Receptionist position at Solomon, Berschler, Warren, Schatz, Flood & Monaghan (at the time) and was quickly promoted to Legal Assistant. When she began working at Solomon, Berschler, she was answering phones and assisting with opening and closing of files as well as new client intakes. She also volunteered to assist some of the Legal Assistants and Paralegals at the firm in order to learn how to handle additional duties. She soon was able to draft correspondence, place calls to the Court, to other firms and assisted with putting files together. She also helped with preparing demand letters for the attorneys. Eventually, she started drafting pleadings and doing legal research.

### ALA MISSION STATEMENT

ALA is the undisputed leader for the business of law, focused on the delivery of cutting-edge management and leadership products and services to the global legal community. We identify and provide solutions to the most strategic and operational challenges our members and customers face today, while we prepare them for the opportunities and challenges of tomorrow.

She worked at Solomon, Benschler for seven years. In between working at Solomon, Benschler and for the Law Offices of Jennifer J. Riley, Jamie worked at a few smaller firms until she started her family.

The Law Offices of Jennifer J. Riley is primarily a family law and mediation practice. They also do basic estate planning, and Jamie now has experience in personal injury, criminal, family law, estate planning, civil litigation and general practice. She reports that family law and criminal have been her favorite areas to work in and she enjoys helping people. Jamie is married and has three children. They live in Glenolden. On the weekends, she is the lead singer of a well-known wedding band in the Philadelphia area (she enjoys singing and has been singing since she was 10).

Jamie is 1 of 10 children. They grew up in Drexel Hill, Pennsylvania and her siblings are in many different career fields including one brother who serves in the military.

**We'd love to feature you and your peers!**

*If you or someone you know are a new member to our chapter from within the last year and would like to be featured in an upcoming edition, we'd love to hear from you!*

*Please send an email to Joan Wean at [jwean@hrmml.com](mailto:jwean@hrmml.com)*

Additionally, together with her family, they run a very successful food drive every year around the holiday season. Her hope is to one day start and run a non-profit organization to help children in need, and she is very passionate that no child goes hungry.

Jamie joined ALA to get more involved in the legal community and to meet other people who hold similar roles in law offices. She believes that the legal profession is changing in many ways including the expansion of the virtual practice and looks forward to growing in her position and in the legal field.

## BUSINESS PARTNER SPOTLIGHT: FRONTLINE MANAGED SERVICES



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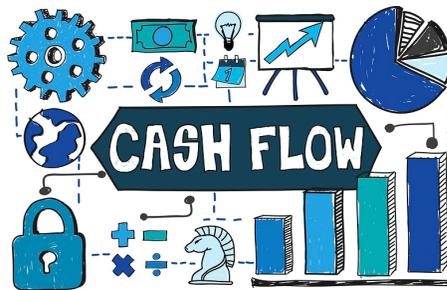
## Optimizing Payment in the Intake-to-Cash Cycle of Client Relationships

By Suzanne Zimmerman of Frontline Managed Services

From the moment a client signs on to be represented by your firm, each step of establishing and defining the relationship can be crucial to ensuring a quicker cash cycle. Accelerating the cash cycle improves overall payment realization because shortening the time between billing and receiving payment is a key driver to ensure the firm gets paid in full or at all. Thinking about each stage of the client's relationship with the firm's billing department as an opportunity to improve the payment process (and client relationship) will lead to better results. When the payment process spans from initial intake to payment (the "Intake-to-Cash Cycle"), firms can expect better financial management and better, longer-lasting client relationships.

The steps in the Intake-to-Cash Cycle include:

- Intake
- Onboarding/Maintenance
- Pre-Bill Edits
- Submission
- Rejection
- Appeal
- A/R Collection
- Cash



### **Intake**

Valuable time can be lost during the billing process if the appropriate information is not collected and distributed to the appropriate parties at the time of client engagement. This can include basic information like how the client would like the firm's billable work to be represented on an invoice. Creating client billing guidelines at intake and sharing those with working timekeepers on an ongoing basis is crucial to make sure expectations are set from the beginning to prevent costly appeals or rejections.

### **Onboarding / Maintenance**

Clients will maintain several relationships with the firm beyond their relationship partner, and that includes the billing department. Establishing the appropriate points of contact for any given client could involve considering a number of skillsets – are they using an eBilling service that requires both dedicated billers to handle their invoicing and an eBilling specialist and platform to monitor payments? Ensuring each client has the appropriate team, processes and payment solution in place at the outset is key to a smooth payment cycle. The "Maintenance" aspect of this step never ends, as it is important to revisit the client needs based on feedback or any issues that may arise during the billing, eBilling or accounts receivable process.

On average, timekeepers who understand and follow client requirements can shorten the cash cycle by up to 30 days.

### Pre-Bill Edits

It is important to distinguish between time entry and billing. While all timekeepers should follow established guidelines, there is still work to be done in the billing department to convert that information into an invoice or eBill that conforms to the client's preferences and all compliance requirements. Further, establishing a process wherein any edits from timekeepers are returned to the billing department in a timely manner is crucial to keep things moving. Another strategy is to divide prebills such that those from the firm's top billing (and likely highest producing) are the first to be reviewed and would have a shorter return time expectation.

### Submission

While we've discussed the importance of both establishing processes in line with a client's preferences, having the right point of contact for each client and making any important revisions before submitting, it all comes together at when submitting the invoice or eBill. While it may be tempting to have the client's relationship partner as the point of contact for every touchpoint, establishing a point of contact in the billing department delivers value at the front and back-end of the transaction. Partners that do their own collections lose billable time, and indirect contact with an accounts payable point of contact is detrimental for quick turnaround and leads to an inconsistent strategy.

### Rejections and Appeals

While all the above advice aims to avoid any rejections or appeals, they are inevitable and should also be addressed in a timely manner. eBilling teams are more tech-enabled to monitor, track and follow up with timekeepers to help meet rejection and appeal timelines. However, when the traditional billing team is asked to handle these eBilling functions, they may fall through the cracks and become delayed due to the billers' other responsibilities. Without the ability to track well, rejections are often found 60 days later than they should be, and when the billing department is too busy to appeal short or rejected payments, the result can be losses of 10+% of collections realization. Separating billing and eBilling can help focus the department to recover rejections with successful appeals.

### A/R Collection

Measurements for effective accounts receivable management include the amount of the portfolio's bills aged less than 60 days, the percentage of payment realization and the dollar amount of write-offs and write-downs. To limit the lost revenue from aging invoices, firms should consider establishing a mandatory collection turnover to the A/R team after 45 days, management oversight with an escalation process and segmentations in the A/R department based on the age of outstanding bills (e.g., expert in negotiations for bills exceeding 180 days). Meet regularly with partners and other client contacts to discuss statuses and to formulate strategies.

### Cash

The billing cycle is as much about client service as any other part of the law firm relationship. Establishing processes and relationships that keep the client happy are crucial to optimizing payment realization, and creating an effective team structure and, again, processes when there are hiccups along the way will make the communications and collections process smoother – leading to a longer, happier client relationship – and more cash for the firm's bottom line.

**Did you know?** Our monthly *Brown Bag Lunches* will now feature a **ROUNDTABLE** format!

Please join us on November 10th for a discussion on mandated vaccines, led by Employment Attorney, Kimberly L. Russell, Esquire of Kaplin Stewart Meloff & Stein, P.C.

RSVP via email to Joan Wean at [jwean@hrmml.com](mailto:jwean@hrmml.com)

**Know an expert? Have a roundtable topic suggestion?**

If you have any thoughts for programs, speakers, or events that you believe would enhance your membership experience, please email Joanne DiFrancesco at [JDifrancecso@highswartz.com](mailto:JDifrancecso@highswartz.com)

We want to see all of our members at our events and presentations, even if it is a face on Zoom!



Suzanne Zimmerman is the Vice President of Financial Services at Frontline Managed Services. She may be reached at [szimmerman@frontlinems.com](mailto:szimmerman@frontlinems.com).

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**Interested in Volunteering?**

**JOIN OUR TEAM!** Please reach out to Joanne DiFrancesco at [JDifrancesco@highswartz.com](mailto:JDifrancesco@highswartz.com) to learn more about how you can become involved!

**BUSINESS PARTNERS APPRECIATION:  
ELMWOOD PARK ZOO**

By Lisa Blair

It was a beautiful day in June as Independence Chapter ALA Members and our Business Partners gathered together at the Elmwood Park Zoo. We were greeted by the hungry Giraffes and many of us were lucky enough to feed them fresh lettuce leaves since it was dinnertime! What magnificent creatures they are! On our pathway to the Trail of The Jaguar, we were able to visit with owls, eagles, zebras, lemurs, Oh My! It was so nice to finally socialize with our Business Partners in person. It was great catching up with old friends and meeting new acquaintances in order to form new business alliances. Also, watching the Jaguars pace back and forth was a fascinating distraction to all of the Happy Hour festivities. But, of course, our main objective was to thank all of our Business Partners for their continuing support of our Independence Chapter ALA.

**LAME DUCK DINNER**

By Brenda Thompson

On Thursday, August 19, the Independence Chapter officers were treated to a fabulous dinner as a thank you for volunteering to serve on the Board. The event



was held at La Provence French Cuisine, in Ambler. Both the location and delicious wines were selected by our Chapter's personal connoisseur of all things wonderful – Joan Wean. It was a beautiful evening to sit outdoors and connect in person with one another. The conversation and laughter continued throughout the evening. Cheers!



**Suggest a Business Partner!** We are always looking to partner with vendors who we know and trust. If you are a vendor who would like more information or you have a suggestion for a vendor, please reach out to Megan Marnie at [mmarnie@c-wlaw.com](mailto:mmarnie@c-wlaw.com)



**ANNUAL BACK TO SCHOOL DRIVE**

By Amy Coral

Sixty children whose families are clients of the Crime Victims Center of Chester County and other social service agencies in Chester County benefitted from our annual Back To School Supply Drive. Lawyers, paralegals and staff employees from a number of our member firms and also several business partners generously donated backpacks, pencils, paper, crayons, glue, gift certificates, etc.

Employees and clients of Franklin Mint Credit Union also donated backpacks. This year we distributed the items on a very hot Saturday in mid-August. Children and families who arrived to select their supplies were treated to a breakfast items and juice boxes. They also enjoyed a visit with Sister Bear from the Berenstein Bears family compliments of Franklin Mint Credit Union. All of the children received a copy of the book "The Berenstein Bears Visit the Credit Union".

In addition to school supplies, we were able to give those agencies money that had been donated, so that the social workers of these agencies could buy new shoes, jackets or items they felt necessary to get a child off to a good start to their school year. Studies show that a good self-esteem sets the tone for how well a child does in school. The chapter was happy to once again support this initiative. Thank you to all who participated!



thank you!

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## CLI: CHAPTER LEADERSHIP INSTITUTE

By Joanne DiFrancesco

This past July, I had the privilege to attend the annual Chapter Leadership Institute (CLI) which was held in person in St. Louis. At first, it seemed it would be doomed to failure- St. Louis was reporting record numbers of new COVID 19 cases, our beloved President, Sandy Caiazzo hurt her knee last minute and could not attend, then Megan Marnie fell ill and was not able to go. I was all alone..... But an amazing thing happened when I arrived-ALA colleagues surrounded each other with a spirit of inclusion, excitement and just plain old' happiness at the prospect of finally seeing each other IN PERSON. From day 1, it was a roller-coaster ride, filled with exciting sessions, speakers and a night of karaoke sponsored by the St. Louis chapter. I found out first hand what incredibly bad singers and dancers we had in our midst, (but I will NOT share the videos from my phone- what happened in St. Louis, stays in St. Louis). Most importantly, I learned more about some of the key responsibilities that I need to take on now as President Elect and Education Chair, as well as those I need to know in 2023, when I move into the role as your President. What a daunting task, but with the information and new friends acquired at CLI, I welcome the challenge!



## DON'T MISS OUT!



The Delaware Valley Legal Expo is a joint production with the Montgomery Bar Association . Now in its 26th year, this landmark event promises to be the largest most interactive Expo to date -- providing a rare opportunity to network with others and witness the latest and greatest products and services available to the legal community today. This perennial favorite has been referred to as the one yearly event where the entire legal community can congregate, share ideas and gain knowledge and information necessary for

running a large firm or a small/solo practice efficiently and effectively. Be sure to register and bring your co-workers, friends and colleagues. All attorneys, administrators and staff are encouraged to

Please come out to support your ALA Independence Chapter so that we can continue to support you throughout the year

**When: Thursday, November 18th from 3p to 7pm**

**Where: Sheraton Valley Forge in King of Prussia**

Registration is now OPEN and **FREE** at  
the Montgomery Bar Association website:

[DELAWARE VALLEY LEGAL EXPO - MBA Events & CLE \(montgomerybar.org\)](http://delawarevalleylegalexpo.com)



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## UPCOMING CHAPTER EVENTS



Virtual Chapter Brown Bag Event  
November 10, 2021 – 12:00 PM



Delaware Valley Legal Expo & CLE Symposium  
November 18, 2021 – 3:00 PM



Educational Event  
January 18, 2022 – 12:00 AM



Educational Event & Changing of the Guard  
March 22, 2022 – 12:00 AM

Check out our [website](#) for more information and registration!

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