



WSSFC 2023

Thursday Afternoon Plenary

Jumping the Generation Gap

Presented By:

Alexis Garuz, Garuz Crawford LLC, Waukesha

Sara Muender, Lawyerist, Largo, FL

Randall L. Nash, Nash Law LLC, Milwaukee

About the Presenters...

Alexis Garuz is the founder of Garuz Legal Group LLC, a criminal defense firm based in Waukesha, Wisconsin. She received her undergraduate degree from the University of Wisconsin - Madison in Sociology and her law degree from Marquette University Law School. She is a member of the Association of Women Lawyers, the Wisconsin Hispanic Lawyers Association, the Waukesha County Bar Association, and the State Bar of Wisconsin. You can find her creating educational and often humorous video content about criminal law on TikTok @attyaalexis.

As a business coach in the Lawyerist Lab program, **Sara Muender** works with lawyers to build healthier law firms through workshops and 1:1 coaching. She makes sure lawyers have the guidance and tools to implement their ideas, grow their business, and build the firm they envision. In a previous life, Sara co-founded and eventually sold a legal-adjacent service company, where she focused on building the company's brand and optimizing the client experience. Following the acquisition, she built a coaching practice helping women and mom entrepreneurs create their best lives and businesses. Sara lives in Atlanta with her fiancé and three young children and hosts her own podcast for fun.

Randall L. Nash of Milwaukee, Wisconsin. Randy is a sole practitioner for Nash Law, LLC. For over 30 years, Randy has successfully represented individuals and businesses in litigation, first with Habush and then O'Neil, Cannon firm. Education: UW Law School, J.D. (cum laude); UW-Madison, B.S., Phi Beta Kappa; junior year in France. Leadership Experience: Board of Governors (2014–2018; 2023- 2024). Past Member and Chair of Media-Law Relations Committee and Professionalism Committee of the State Bar. Past Member of Wisconsin Assistance for Lawyers Committee. Past Board Member Milwaukee Young Lawyers. Served 5 years as Adjunct Assistant Professor at Marquette University Law School teaching trial advocacy. Authored the Damages chapter in the Wisconsin State Bar book on Contract Law. Recognitions: Was certified by the National Board of Trial Advocacy as a Civil Trial Specialist, is a Fellow in Litigation Counsel of America, the Wisconsin Law Foundation and the American Bar Foundation. Named one of Wisconsin's Top 100 litigation lawyers by the American Society of Legal Advocates. Lifetime Achievement Membership among America's Top 100 Attorneys; Martindale-Hubbell AV Preeminent rated; Wisconsin Super Lawyers. Personal: Lives in Whitefish Bay with his wife, Nell, and has four adult children.

Generational Differences and the Practice of Law

Transparency Statement: AI-Assisted Content Generation

We are committed to delivering high-quality and relevant course materials to enhance your learning experience. In the development of this outline, we have utilized Chat GPT AI technology to assist in generating this outline and to organize content.

Introduction

1. Brief introduction of the concept of generational stereotypes and their impact on workplaces
2. The relevance of this issue in the context of a law firm
3. The purpose of the presentation: to explore how generational stereotypes can hold back a law firm in effectively managing its employees and clients

1. Understanding Generational Diversity

- a. Definition of the different generations present in the workforce
- b. Unique characteristics and experiences of each generation shaped by the historical and cultural context they grew up in
- c. How generational diversity can bring a wealth of perspectives and skills to the law firm

2. Common Generational Stereotypes

- a. Prevalent stereotypes associated with each generation, such as:
 - i. Baby Boomers being resistant to technology
 - ii. Millennials being entitled
 - iii. Gen Z being overly reliant on social media

- b. How these stereotypes are oversimplified generalizations that fail to capture the true essence of individuals within each generation.

3. Impact on Employee Relations

- a. How perpetuating generational stereotypes can hinder effective communication and collaboration within the law firm
- b. How assumptions about work habits and preferences can lead to misunderstandings and conflicts among different generations
- c. Examples of how embracing generational diversity can lead to innovative solutions and improved teamwork

4. Effect on Client Relationships

- a. How generational biases can influence how the law firm interacts with clients from various age groups.
- b. Scenarios where failing to understand clients' unique needs and communication styles based on their generation can result in lost opportunities or client dissatisfaction.
- c. The importance of building trust and rapport with clients by recognizing their individuality beyond generational labels.

5. Strategies to Overcome Generational Stereotypes

- a. The importance of fostering an inclusive work environment where all generations' perspectives are valued
- b. How to encourage open dialogue and mutual learning among different generations within the law firm
- c. Discuss mentorship and reverse mentorship programs to facilitate knowledge sharing and skill development across generations.
- d. The importance of ongoing training and workshops to address unconscious bias and promote empathy.

6. Benefits of Embracing Generational Diversity

- a. Research and case studies showcasing the positive outcomes of diverse teams in law firms
- b. Discuss how a diverse workforce can enhance problem-solving, creativity, and overall performance.
- c. How law firms can attract a broader range of clients and gain a competitive edge through breaking down generational barriers

7. Real-world Examples

- a. Success stories of law firms that have actively embraced generational diversity and reaped the rewards
- b. How these firms adapted their management styles, communication approaches, and client engagement strategies

8. Summary

- a. Key points discussed in the presentation
- b. Reinforcement of the idea that overcoming generational stereotypes requires a collective effort and commitment from all levels of the law firm
- c. Encourage the audience to reflect on their own assumptions and biases and take steps to promote a more inclusive and productive workplace

GENERATIONAL DIFFERENCES

BY:

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I. Generalizations

Nearly everything I say is a generalization. There are exceptions.

II. Practice Tips: Generational Conflict in the Legal Profession, Michael Moore, The Wisconsin Lawyer, Vol 83, No. 7, July 2010.

- a. Baby Boomers 1946-1964
 - i. Vietnam, civil rights
 - ii. Value ideas, can be career driven
- b. Gen X 1965-1981
 - i. Watergate, recession, divorce, women in the workplace
 - ii. Do not expect loyalty from employers. They are free agents
- c. Millennials after 1981
 - i. 9/11, wars in Iraq and Afghanistan
 - ii. Diversity, teamwork
- d. More communication
 - i. Baby boomers check voice and emails more frequently
 - ii. Gen X & Millennials use phone more, emails less
- e. Goal is always excellent client services
 - i. Alternative work styles
 - ii. Client services comes first
 - 1. Personal needs do not come before client and firm needs
- f. Mentoring

- III. Dispelling Workplace Myths about Millennial Lawyers, Megan Heneke, Wisconsin Lawyer June 1, 2018.
- a. Millennial generation has become the largest generation in the American workplace
 - i. 44% minority
 - ii. A focus on generational differences is unhelpful at best and counterproductive at worst
 - iii. Myth #1 - Job hoppers, nearly the same in 1980
 - iv. Myth #2 - Self-centered workplace values. One large study said millennials even less likely to say managing work-life balance as a long-term goal than Gen X and BB.
 - v. Diversity - effect of S.C. decision
 - vi. They want what all of us want - add value, purpose, use degree in fulfilling ways

- IV. Law Firm Culture: How does yours fare in the Millennial Market, Joe Forward, Inside Track, September 4, 2019
- a. Born between 1981 and 1996, about 40% of America's working population
 - i. Internet and social media
 - ii. Older attorneys perceptions of younger attorneys - disloyal, entitled, not willing to earn their strips
 - iii. Millennials want a formal system for feedback and professional development
 - iv. Excessive work demands not worth the sacrifices of personal life
 - v. A flexible work schedule, more important than pay and promotions
 - vi. Emphasize teamwork and a sense of community
 - vii. Support and appreciation
 - viii. The billable hour vs. everything else

V. Observations

a. Changes

- i. Older - no email, cellphones, computers, fax
Younger - 24 hour access, expectation of immediate access
- ii. Older - finder, minder, grinder
Younger - work life balance
- iii. Older - research
Younger - most extensive and expensive research tools
- iv. Older - work at office, hours, stay late, start early
Younger - flexibility, work life balance, remote
- v. Older - civic organizations, community work
Younger - marketing on social media
- vi. Older - more formal attire
Younger - business casual, very casual
- vii. Older - call client, opposing counsel
Younger - emails or text
- viii. Older - confidentiality
Younger - outside of office, telephone
- ix. Older - work is number 1, impact on relationships
Younger - work life balance

- I. Generational differences across client base.
 - a. What is the age demographic of your target client?
 - b. Why does this matter? Tailoring your approach sets up a law firm for success.
 - i. How do we market to this audience? (Social media, short form video, etc. vs. print, radio, etc.)
 - ii. How do we build rapport and position ourselves as thought leaders in our niche? (What do people think of when they think of an attorney? Challenging ideas of what an attorney looks like.)
 - iii. Are we communicating in ways that best serve our clients' preferences and comfort level? (Letter vs. email/text/client portal, zoom/google meet vs. traditional office meeting)
- II. Finding the best of both worlds.
 - a. Systems and processes.
 - i. Embracing automation, AI, case management software and adapting billing practices. Work smarter, not harder.
 - ii. Relationship building and mentorship drawing from the wisdom and experience of more senior attorneys/staff.
 - iii. Bottom line – keep what works while embracing change.
 - b. Leading your teams.
 - i. Communication is key.
 - ii. Collaborative efforts draw on the strengths and perspective of team members from different generational backgrounds.
 1. Taking advantage of boomer + experience because, they will no longer be a major part of the workforce going forward.
 2. Don't forget about retirees! Many still willing and wanting to work.
- III. Personal anecdotes from a Millennial law firm leader.
 - a. Background.
 - i. Three attorney firm with staff ranging from Gen Z to Baby Boomer.
 - ii. Both myself and law partner (38) were trained in traditional legal environments and wanted to incorporate a more flexible way of practicing, recognizing that we each had approached burnout in different ways.
 - iii. Needed help creating policies and procedures as we grew, which led to hiring office manager, who had retired from 30 + years in non-profit management.
 - b. Marketing
 - i. Our client base tends to skew younger, and we've embraced that through social media content creation.
 1. Brand recognition.
 2. Lead generation.
 - ii. Networking is timeless.
 - c. Optimizing the work environment.
 - i. Flexible schedule, with parameters.

Bridging the Generation Gap
Attorney Alexis Garuz
Presentation Notes
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- ii. Compensation structure that rewards lead/revenue generation, not simply hours billed.
- iii. Training our associate attorney with emphasis on areas we felt were overlooked during our formative years as new attorneys.