



THE MPF WEBINAR SERIES

DEVELOPING AN EFFECTIVE WORKING RELATIONSHIP BETWEEN YOUR FIRM'S MANAGING PARTNER AND PRINCIPAL ADMINISTRATOR

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President, TheRemsenGroup

Oliver Yandle, JD (Moderator)
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Director of Administration, McCullough Hill Leary, PS

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Managing Partner, McCullough Hill Leary, PS

Valerie A. Williams
Chief Firm Administrator, Pender & Coward

June 20, 2018



404.885.9100 - www.TheRemsenGroup.com

ALA/ABA/MPF WEBINAR

June 20, 2018 – 2:00-3:00pm CT

Title: **Developing an Effective Working Relationship
between Your Firm's Managing Partner and Principal Administrator**

Description: We're proud to present this Webinar in partnership with the [ABA's Law Practice Division](#) and the [Association of Legal Administrators](#).

Your law firm is a business and, as such, it's critically important to have a strong, competent, strategic leadership team to keep your firm profitable and deliver value to clients and firm owners. The two most critical players in this leadership role are the principal administrator, or COO and the managing partner, or CEO. Working together, these leaders can ensure your firms are positioned for long-term success in a dynamic and competitive environment.

Objectives:

- Discover why the CEO-COO relationship is so important to running a successful law firm
- Learn the importance of clearly defined roles and job descriptions for firm leaders
- Develop and maintain a highly efficient and productive working relationship with one another



Speakers:

Oliver Yandle, JD (Moderator)
Executive Director, Association of Legal Administrators
John Remsen, Jr. (Moderator)
President, TheRemsenGroup
David L. Arnold, Esq.
Chief Operating Officer, Pender & Coward
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Media Links:

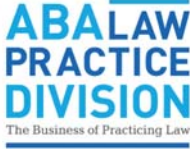
Website:	ManagingPartnerForum.org
Twitter:	twitter.com/mpartnerforum
LinkedIn:	linkedin.com/company/managing-partner-forum
YouTube:	youtube.com/user/MPartnerForum

REV: June 15 2018



Developing an Effective Working Relationship between Your Firm's Managing Partner and Principal Administrator

June 20, 2018



Welcome to Today's Session

Developing an Effective Working Relationship between Your Firm's Managing Partner and Principal Administrator

Join us for a fast-paced, interactive panel discussion to:

- Discover why the CEO-COO relationship is so important to running a successful law firm
- Learn the importance of clearly defined roles and job descriptions for firm leaders
- Develop and maintain a highly efficient and productive working relationship with one another






Oliver P. Yandle, JD, CAE

Executive Director, Association of Legal Administrators

Current	Association of Legal Administrators • 9,000 members, 100 chapters
Previous	SmithBucklin, Commercial Law League of America, International Assn of Defense Counsel
Experience	Executive Director, Vice President, Senior Director, General Counsel
Education	JD – American University BA – Loyola University New Orleans




ABOUT THE ASSOCIATION OF LEGAL ADMINISTRATORS

- Nearly 9000 members across the world
- 91 chapters
- Networking, education and resources for leaders in the business of law
- 2/3 of membership responsible for overall management of law firms
- Compensation and Benefits Survey, Job Bank
- Annual Conference, 2 Regional Conferences, various specialty conferences
- alanet.org






John Remsen, Jr.

President, TheRemsenGroup
President & CEO, Managing Partner Forum

Current	Strategic Planning, Firm Retreats, COO/CMO Searches More than 350 law firms since 1997
Previous	Gunster, Porter Wright
Speaker	American Bar Association, Association of Legal Administrators, Legal Marketing Association, MPF Annual Conference, Law Firm Networks
Education	MBA – University of Virginia (Darden) BSBA – University of Florida




ABOUT THE MPF LEADERSHIP CONFERENCE

- Twenty-six (26) Leadership Conferences since 2002
- Florida, Texas, Southeast, Midwest, Northeast
- 1,200 participants from 950 law firms
- High level participants
- Maximum peer interaction
- Next Conference: May 2, 2019, in Atlanta, Georgia
- www.ManagingPartnerForum.org






April Campbell, JD

President, Association of Legal Administrators
 Director of Administration, McCullough Hill Leary, PS

Current

McCullough Hill Leary, PS

- 11 lawyers
- One office

Previous

Perkins Coie, Young deNormandie, Clackamas County Circuit Court, Washington

Experience

Attorney, Firm Administrator, Legal Staff Supervisor, Pro Bono Manager, Operations Manager

Education

JD – University of Oregon
 BS - Pennsylvania State University






John H. "Jack" McCullough, Esq.

Managing Partner, McCullough Hill Leary PS

Current

McCullough Hill Leary

- 11 lawyers
- One office

Experience

Real Estate Financing, Real Estate Development

Education

JD – Harvard Law School
 BA – Harvard College






Valerie A. Williams

Chief Firm Administrator, Pender & Coward

Current	Pender & Coward, PC <ul style="list-style-type: none"> 30 lawyers Three offices
Previous	Dominion Law Associates
Experience	Financial Management, Human Resources, Systems Administration, Security, Facilities Management
Education	Tidewater Community College






David L. Arnold, Esq.

Chief Operating Officer, Pender & Coward

Current	Pender & Coward, PC <ul style="list-style-type: none"> 30 lawyers Three offices
Experience	Eminent Domain Practice Group Leader, Civil Litigation, Real Estate, Business Law
Education	JD – William and Mary Law School BA – University of Virginia



ASK QUESTIONS PLEASE, ASK QUESTIONS





THE LAWYER PERSONALITY

- Highly skeptical
- Hate change
- Risk averse
- Love autonomy
- Low resilience
- High sense of urgency

Source: Dr. Larry Richard – LawyerBrain, LLC



MPF 2017 SURVEYS

- **MPF Leadership & Governance Survey**
Anonymous online survey, 48 questions, April 13-21, 2017
154 CEOs, MPs, firm leaders, 10-200 lawyers
- **MPF 2017 Leadership Conference**
Audience polling results, May 4, 2017
87 firm leaders, 8-500 lawyers
- **ALA/MPF 2017 Leadership & Governance Survey**
Anonymous online survey, 48 questions, August 4-15, 2017
254 COOs, EDs, firm administrators, 5-500 lawyers



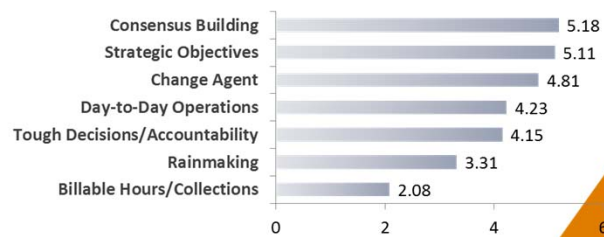
**TELL US ABOUT YOUR ROLES AS
LAW FIRM COOs AND CEOs**



YOUR MOST IMPORTANT CONTRIBUTIONS AS FIRM LEADER

MPF Survey – CEOs, MPs

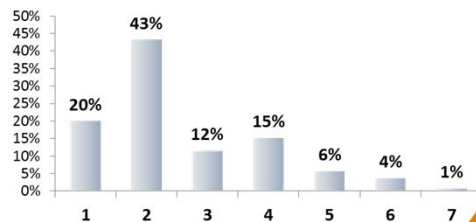
(Rate on 1-7 scale. 7 is the highest.)



ENJOY THE LEADERSHIP ROLE?

MPF SURVEY – CEOs, MPs

(Rank on 1-7 scale. 1= love it. 7= hate it.)

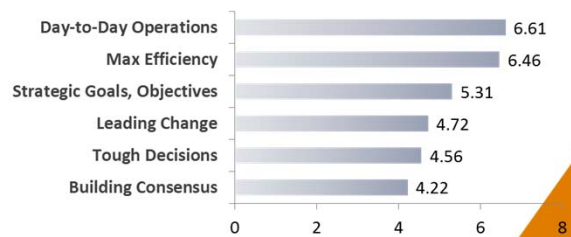




YOUR MOST IMPORTANT CONTRIBUTIONS AS FIRM LEADER

ALA/MPF SURVEY – COOs, EDS, ADMINISTRATORS

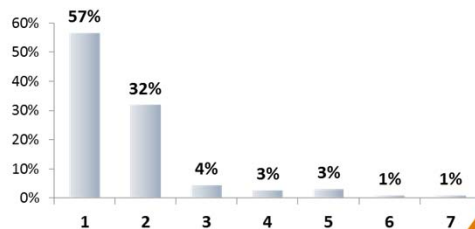
(Rate on 1-7 scale. 7 is the highest.)



ENJOY THE LEADERSHIP ROLE?

ALA/MPF SURVEY – COOs, EDS, ADMINISTRATORS

(Rank on 1-7 scale. 1= love it. 7= hate it.)

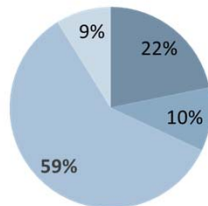




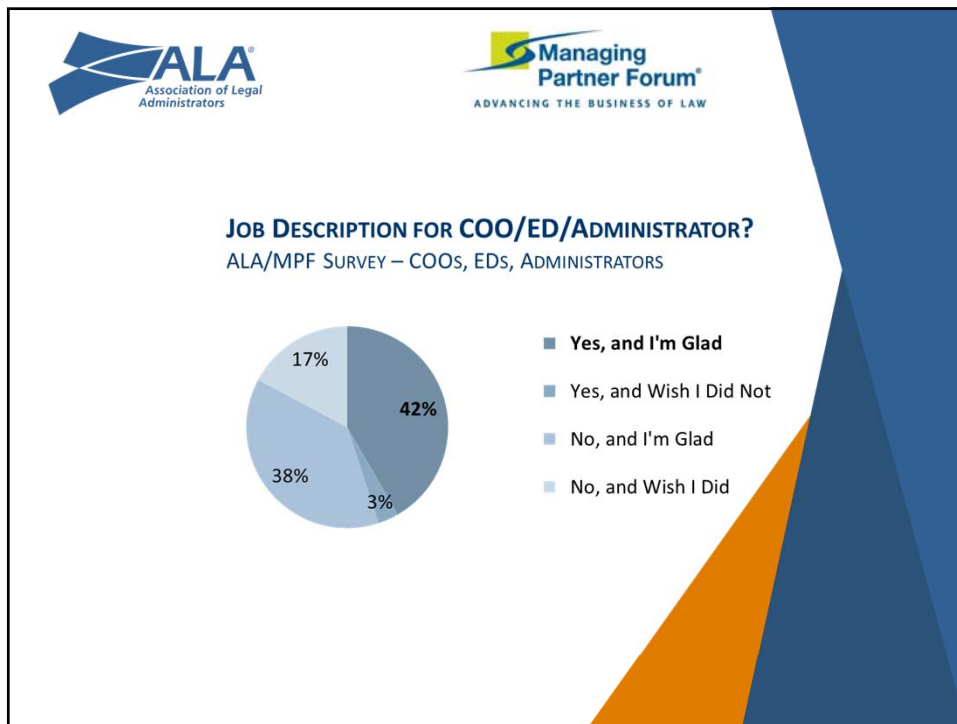
DO YOU THINK LAW FIRM LEADERS SHOULD HAVE WRITTEN JOB DESCRIPTIONS?

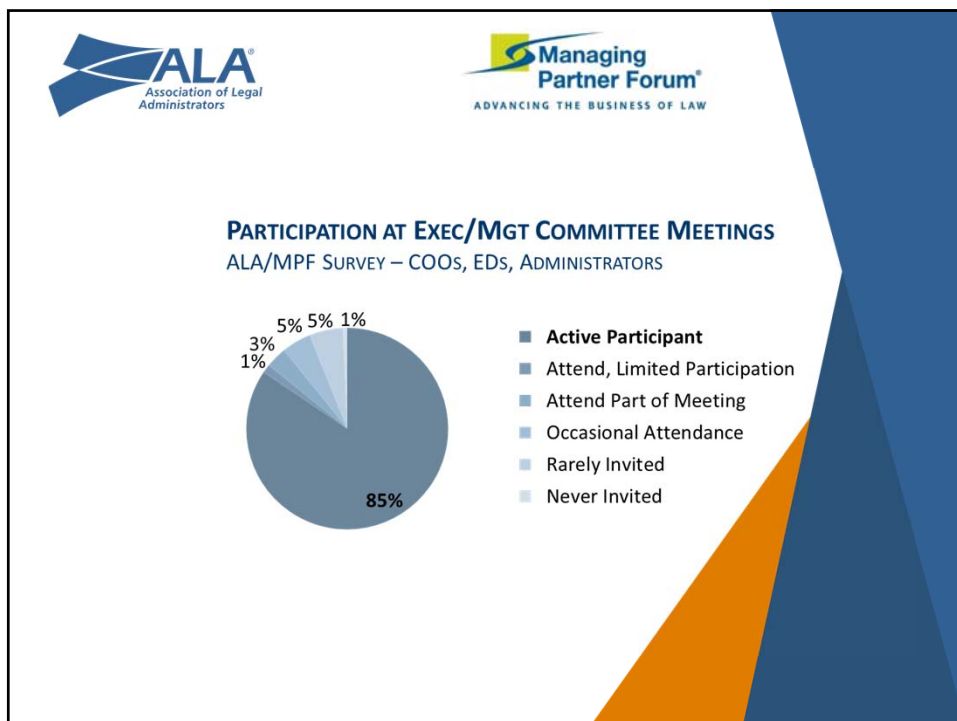
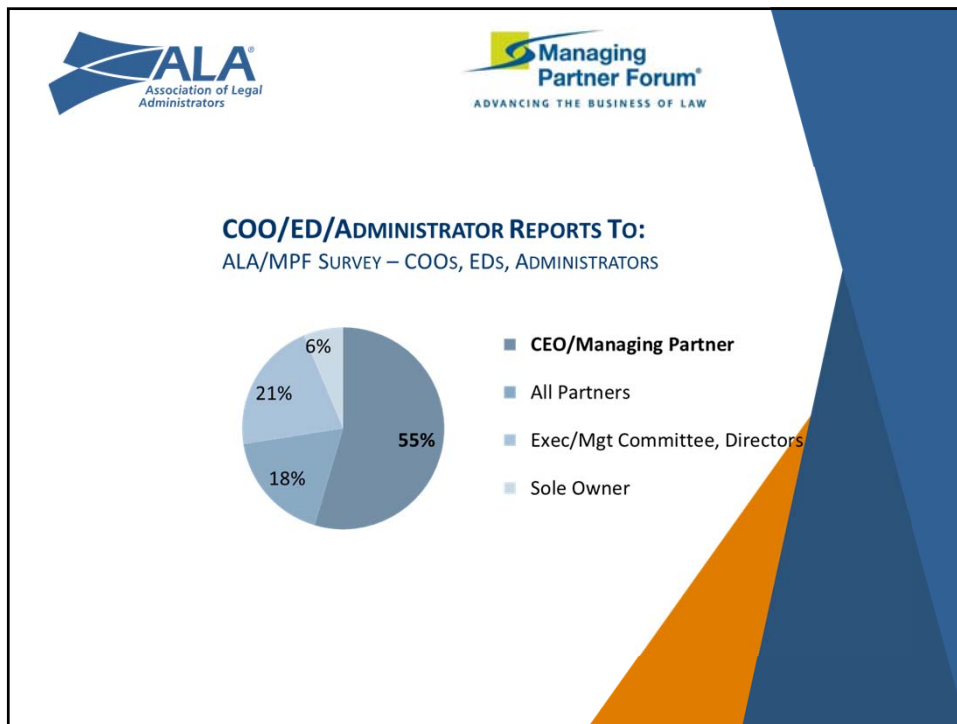


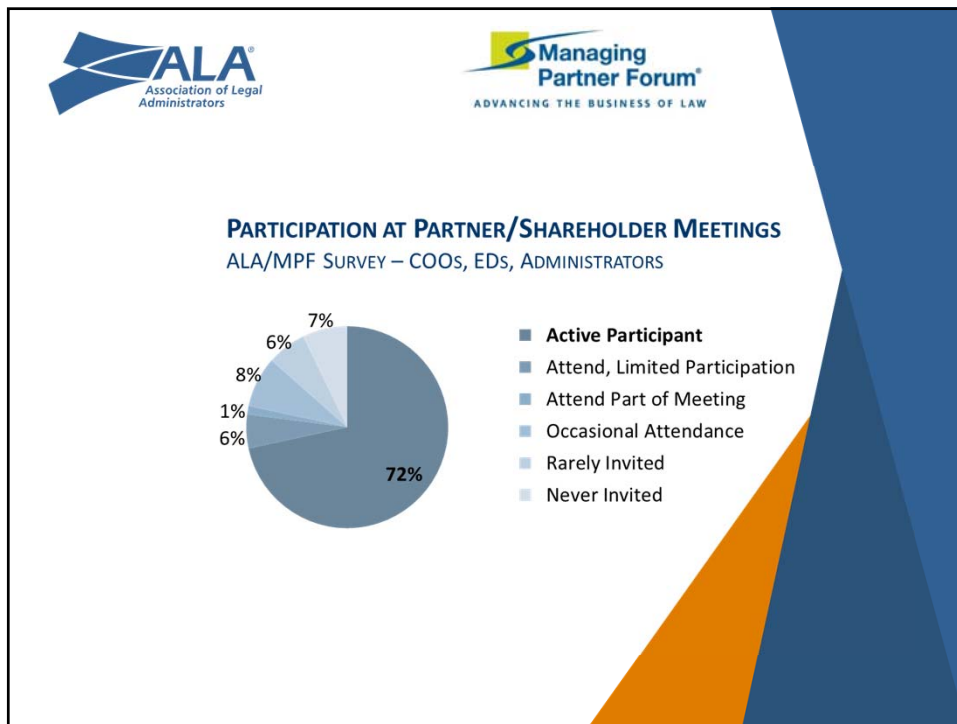
JOB DESCRIPTION FOR CEO/MANAGING PARTNER MPF SURVEY – CEOs, MPs



- Yes, closely followed
- Yes, not closely followed
- No
- Work in progress







ALA
Association of Legal Administrators

**FINALLY, WHAT ADVICE WOULD YOU
GIVE FELLOW COOs AND CEOs?**



Additional Resources

Association of Legal Administrators – alanet.org

Managing Partner Forum – www.managingpartnerforum.org

ABA Law Practice Division -- www.americanbar.org

TheRemsenGroup – www.theremsengroup.com

McCullough Hill Leary, PS -- www.mhseattle.com

Pender & Coward – www.pendercoward.com



Recommended Reading

Rise of the Legal COO

The Extraordinary Managing Partner

The Extraordinary Administrator

First Among Equals

- Maister, McKenna

Serving at the Pleasure on My Partners

- McKenna



Thanks to Our Panel!



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Please give us your feedback!





ALA
Association of Legal
Administrators

**Managing
Partner Forum**
ADVANCING THE BUSINESS OF LAW

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The Renssen Group
Smart Strategies for the Future of Thinking Law Firm



Hiring a Legal Management Professional

Defining The Administrator's Role

Oftentimes a legal administrator's responsibilities are similar to those of a corporate Chief Operating Officer. The administrator should have responsibility for the overall day-to-day operations of the firm, including supervision of support staff, but specific duties and tasks may vary from one firm to the next. Likewise, the administrator's role will continue to change as the firm allows him or her to assume additional responsibilities. Refer to these [sample job descriptions](#) for an idea of the traditional responsibilities of a legal administrator. They can be used as a template for crafting a more tailored description for your administrator based on your firm's philosophy, organizational structure and goals. Ideally, the job description will be developed before the search process begins and can, therefore, be provided to final-round interview candidates.

Remember: Industry consultants and experts agree the success of a firm's administrator hinges, in part, on establishing and adhering to a clearly defined job description. Therefore, this document is an important piece of the overall process.

Once a hire is made, be sure to provide the administrator with a sufficient amount of time to get acquainted with the lawyers and staff, and to get acclimated to the culture and tone of your office. While there isn't a specific benchmark for this "settling in" period, anywhere from four to eight months should be sufficient. In the long run, the time allowed for this will be time well spent. Also, keep in mind that the administrator, especially in those early months of employment, will need frequent interaction with the lawyers who previously administered the firm.

In order for your administrator to operate effectively, the chain of command must be clearly identified. This will avoid unnecessary confusion and frustration for the administrator, lawyers and staff.

Due to the confidential nature of the firm's business and personnel administration, the administrator requires a private office. The need for an assistant or secretary is subject to firm size and the scope of the administrator's duties.

Acceptance and Feedback: The Keys to Success

The management or executive committee and all lawyers in your firm must accept the legal administrator – both the position and the person – and view that role as vital to the firm's success. If lawyer support is lacking, there will be a corresponding lack of support from the staff. The partners or shareholders of a firm must also be willing to accept the notion of someone other than a partner or shareholder making recommendations, participating in their meetings and contributing to the agenda.

As mentioned earlier, don't forget the value of constructive feedback to your new administrator. The better understanding he or she has of what you want and how well those expectations are being met, the more the overall relationship will benefit your firm and its operations.

Key Performance Indicators to Meet Your Strategic Goals

By Roberto Rossi Steffens

“What is not measured cannot be managed.”

Uttered decades ago by statistician William Edwards Deming, this sentiment remains current, portraying something indispensable to management and also to any successful endeavor: the use of performance indicators.

The reality for organizations — including the legal industry — is that resources are limited, change happens quickly and customers are becoming more demanding. Running a business becomes more complex as competition increases and people can get the job done from virtually anywhere around the globe. In this scenario, efficiency is the key feature that defines the success of each organization.

According to *The American Lawyer* magazine, law firms on average are showing lower revenues per lawyer in recent years. It's becoming increasingly important to know what is making money and what isn't. When the firm knows the time, cost and effort it takes to manage their cases, it becomes easier to maximize resources and profit. One way to do that is by using key indicators to dictate your strategic plan.



objectives.

It also becomes easier to compare performance levels between different initiatives, which may enable identification (and dissemination) of best practices and eventually promote a timely relocation of resources.

When the firm knows the time, cost and effort it takes to manage their cases, it becomes easier maximize resources and profit.

IDENTIFYING KEY INDICATORS

Key performance indicators allow you to check efficiency levels of processes. Plus, they can be customizable based on your office needs. There are various types of indicators (quantitative, qualitative, internal, external, comparative, directional and actionable) that are measurable; some examples of these include compliance, productivity, waste, delay, input, output and turnover. In addition, measurements can be executed when needed or feasible.

Indicators make it possible to monitor the performance of activities, projects, organizations, regions, countries or even global scenarios. By measuring what is being executed, an organization can manage resources and adjust strategies accordingly to achieve the proposed

Many people think that the only function of performance indicators is to show what's happened in the past. But they show much more than that, including the basis for future projections and decisions. These become more transparent and objective, leading to gains in efficiency and legitimacy — both fundamental aspects in the current globalized and competitive market.

Previously, two major obstacles to the use of performance indicators were the scarcity of data and the lack of tools to analyze it. Managers hardly had the necessary information for effective decision-making. Nowadays, however, technology makes data availability practically endless.

WHAT SHOULD BE MEASURED?

Good indicators should generate valid and understandable data. They should also represent reality and be obtained at justifiable cost, effectively providing useful information to management whenever necessary. What actually determines which indicators have such characteristics is another key item for management: strategic planning.

Organizations that have clearly defined their mission, vision, values, goals and action plans — and have also done a SWOT analysis (strengths, weaknesses, opportunities and threats) — will be better able to determine which indicators are really useful for their activity.

Strategic planning is not one of those practices that come one day and disappear soon after — on the contrary, it is a widely tested, improved and consolidated management tool used by the world's largest organizations. Those companies that develop and put into practice their strategic plan show better performance.

On the flip side, those that fail to evolve and don't attend to customer needs take the risk of losing market share, and worse, long-term sustainability.

It should be noted that the relationship between the use of indicators and strategic planning depends on the conditions involved. Each type of professional activity has its own particulars. Even your strategic planning process may eventually need revisions since the environment is constantly changing.

Strategic planning is a powerful tool that ensures necessary and continuous adaptations happen efficiently. When performance indicators are

based on the strategic plan, they provide the right information to check for success.

ABOUT THE AUTHOR

Roberto Rossi Steffens is an Administrator with more than a decade of experience in the corporate world developing work systems related to legal management. He's acted as a team leader, support coordinator management and collaborator on several projects at the General Counsel's Office of the Central Bank of Brazil. He's also an international member of ALA. Email Steffens [here](#).



**ROBERTO ROSSI
STEFFENS**

*Support Management
Coordinator, Central
Bank of Brazil*

Your Firm Administrator

It's The Best Investment Your Firm Can Make

By John Remsen, Jr.

You've always thought that you could run a business. After all, you see successful businessmen in your community every day and, while you respect them for their accomplishments, you can't help but feel that you could do as well, if not better, in running your law firm.

Be careful what you ask for. As managing partner of your law firm, you have a business to run. And it's a substantial enterprise. Our data indicate that a firm of 20 or so lawyers might bring in annual revenue of near \$8,000,000. "Dollars in the door" is often not the problem for smaller and mid-sized law firms. The problem is how to invest those dollars to create even more dollars in the future. Or, put another way, how to enhance your firm's return on its investments in human capital – its lawyers and staff.

We All Know the Problem . . .

And it shows up in our survey data year-after-year. At the MPF Spring Leadership Conference held in April, we asked 62 managing partners to identify their most important contributions as firm leaders. Their answers, in order of value, were:

- Initiating change for long-term success.
- Building and maintaining consensus among partners.
- Promoting and encouraging sharing and teamwork.

In prior years, "building and maintaining consensus" has consistently been the number one answer. "Focusing attention on long-term strategic objectives" has also been among the top answers in prior surveys. And, generally, these are the areas toward which an effective managing partner should be focusing his or her time.

Yet, when we asked where they actually spent most of their management time, the same managing partners overwhelmingly acknowledged that day-to-day administrative matters of the firm had to be their first priority. We see this again and again. The more important contributions of leading a law firm gets pushed to the side as firm leaders grapple with day-to-day administrative tasks. Refer to the attached survey results for details.

It's a common problem, but one for which a remedy is at hand.

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Managing Partners Should Think and Act Like CEOs, not Managing Partners

Simply put, a CEO (and as managing partner of your firm, that's what you are) should not be bogged down in day-to-day administrative activities. It is not the highest and best use of your time, which should be focused on big picture, strategic initiatives. And you know this.

So here's where a trusted, competent firm administrator (I like the title "Chief Operating Officer") can make all the difference in the world. Our panel of experts at the Spring Conference agreed: law firms would be well served by hiring and empowering a strong COO to manage administrative matters of the firm. They also agreed that the COO should be given important responsibilities, along with a seat at the table at partnership and executive committee meetings.

To think of such a key player as overhead that the firm "can't afford" is short-sighted. In a corporate environment, the CEO doesn't run the corporate IT department, or the HR function, or the marketing program, or even the financial operations of his or her company. And the law firm CEO shouldn't either. Appropriately skilled administrators are an investment in the firm's future – a future the managing partner should lead, not simply manage.

By the way, I like the title of "Chief Executive Officer," not managing partner, for the leader of the firm. More leading (and less managing) would be a good thing for most law firms.

But Many Won't Take the Leap . . .

Does your firm have a strong COO supporting your leadership? If not, why not?

Maybe your partners don't value anything but dollars in the door. In fact, the leaders of almost every smaller and mid-size firm will tell you their firms are both under-led and under-managed. As we've discussed, that's a penny-wise and pound-foolish approach to running a law firm. The law firm economic surveys reveal that the most profitable firms have higher overhead per lawyer. They are investing substantially in their futures, including areas such as administrative staff (not secretaries and paralegals, but rather HR, IT, marketing, and finance professionals), associate development, marketing and technology.

Or maybe your partners don't like the idea of giving a non-lawyer so much power and control? The key here is trust and open communication between the managing partner and the firm administrator. Under the leadership of now retired Executive Director John Michalik, the Association of Legal Administrators addressed this issue in several ways, including the creation of a job descriptions repository on which law firms can draw.

Or, maybe it's just too hard for those who have risen to the role of managing partner to give up all that independent authority. The relationship between a managing partner and an empowered chief administrator requires that the managing partner let loose of some of the indicia of authority. An effective COO needs an autonomous sphere of responsibility. In short, a COO needs a seat at the table as much as the managing partner does.

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Your Firm Administrator: It's The Best Investment Your Firm Can Make

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And other partners in the firm must be directed to bring issues within the COO's sphere of authority to the COO, not their old colleague in the corner office. Managing partners and chief administrators must function as a team characterized by easy communication and cooperation. And each must have the other's back.

Or maybe it's the money. Perhaps the firm's partners just don't want to surrender additional assets for what they perceive to be a substantial overhead expense. We recommend that bringing in a COO is no place to skimp on compensation. Again the ALA, under the direction of Rosemary Shields, has conducted numerous salary surveys intending to establish compensation benchmarks for administrative expertise. A firm should expect to pay an annual salary of between \$125,000 and \$250,000 for the managing partner's right-hand man (or woman).

Evolution of the Firm Administrator

In the 1970's, retired military officers were often hired as firm administrators on the assumption their military training would apply to the law firm's management matters.

In the 1980's, many firms (including my former firm, Gunster, and NYC powerhouses like Wachtell and Skadden) hired non-lawyer CEOs and empowered them to run the place more like a business. Again, we don't see too many of them out there anymore.

Today, many firms have hired professionals with strong finance and/or HR backgrounds. We see many CPAs in these roles. But, all too often, they do not have a seat at the table and they are not valued members of the firm's leadership team as they should be.

MPF Recommendations

1) Educate Your Partners about the Importance of Investing in Your Firm's Future

Share articles like this one, circulate highlights of the law firm economic surveys, and read most anything written by David Maister. It's not all about today's billable hours and collections, the most successful firms are investing in the future.

2) Hire and Empower Trusted and Competent Senior Administrative Staff

As previously mentioned, this is not the place to skimp. Get good people and let them do their jobs. For example, I often run into younger, growing firms where the managing partner's secretary has evolved into the firm administrator role. He or she may or may not have the skill set required as the firm grows larger and the demands of the position grow along with it.

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3) Give Your Firm Administrator a Seat at the Table

Your firm administrator is an important member of your firm's leadership team. As such, he or she should be included in executive/management committee and partnership meetings. If you don't have the trust and confidence that your administrator can be a valuable contributor at these meetings, maybe it's time to hire a firm administrator who can.

4) Create Job Descriptions for Firm Leaders (including Senior Staff) and Firm Committees

We also recommend that you create job descriptions for this and other important roles in the firm setting forth duties and responsibilities, as well as reporting relationships. [Click here](#) to see several examples of COO job descriptions on the MPF Website. This should also be done for important committees of the firm, as well.

The Bottom Line

Of course, in the end, it's about the firm's bottom line. Investing in administrative talent can be expensive in terms of time, money, and operational change. And there is no easy way to quantify a return on the investment.

But this I know from more than 20 years of working with hundreds of law firms, and observing and participating with law firm leadership:

There is a world of difference in the operations and the profitability of law firms with great administrators and those without!

###



About the Author

John Remsen, Jr. is President and CEO of [The Managing Partner Forum](#), the country's premiere resource for managing partners and law firm leaders. He is also President of [TheRemsenGroup](#), one of the country's leading consulting firms for mid-size law firms. He can be reached at 404.885.9100 or JRemsen@ManagingPartnerForum.org.