

“Managing the Career Cycle to Develop Highly Successful Lawyers”

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Career Development Strategies for Lawyers

The Key Question

As a law firm leader, how do you best create systems, programs, and incentives that enable and motivate lawyers to meet firm goals and objectives at various stages of their careers?

Introduction

- The goal of law firm leaders is to create conditions that help enable lawyers to become "highly successful".
- What do we mean by "highly successful"?
- What does it mean at each stage of a lawyer's career?

- During the different stages of a lawyer's career, there will be markedly different:
 - Knowledge levels
 - Client responsibilities
 - Motivations
 - Responsibilities
 - Expectations
 - Career objectives
 - Types of Firm contributions

- What systems, programs, rewards, recognition and culture help enable success during the various stages of a lawyer's career?
- Given the markedly different stages, “one size does not fit all”.

Some Cautions About the “Stage Analysis”

The Stages of a Lawyer's Career

1. Introduction to the practice of law
2. Assuming direct client responsibilities
3. Developing business development skills
4. Understanding the business of law
5. Transitioning to partner
6. Becoming a trusted advisor to clients
7. Actively contributing to the success of others
8. Planning for retirement.

For each of these stages, we will consider management challenges and questions that arise and some potential strategies to maximize the opportunities for success during each stage.

1. Introduction to the practice of law

- Making a successful transition from articling student to associate.
- During this stage associates focus on developing technical competence with respect to the practice of law.

Associates in this stage also:

- Explore various areas of the law seeking a favorite focus.
- Begin to develop practice management skills.
- Search for allies and mentors within the Firm.[\[1\]](#)

More on the first stage...

- Associates don't commit to firms, they commit to individual mentors
- Associates expect ongoing learning, immediate feedback and collaborative relationships
- “Sink or swim” approach doesn't cut it.
- Highly mobile – looking for engagement

Challenges /Strategies for Law Firms

- Orientation programs for new associates.
- Assignment of mentors
- If no formal mentorship program, informal mentors?
- General or specialized practice?
- Monitoring allocation of work
- Meaningful and regular feedback
- Professional development plans

Onus is on the Law Firm

- Firms need to assess whether the lawyer's technical knowledge and people skills demonstrate potential for career growth.
- Associates are most marketable at the 3 to 5 year level.
- Treat departing associates well.

2. Assuming direct client responsibilities

- Lawyers not only work on the files of other lawyers, but also begin to develop direct responsibilities for certain files and clients.
- Lawyers need to develop client-management skills.

Challenges/Strategies for Law Firms

How do we determine when a lawyer is ready for direct client responsibilities?

- Mentor feedback
- Performance reviews
- Client feedback & audits
- Communication skills training

3. Developing business development skills

- Early in their career lawyers tend to receive all their work from other lawyers within the Firm.
- Lawyers begin to understand that they have responsibility to develop new business.

It can be overwhelming!

Lawyers ask themselves: How do I learn how to do it? Young lawyers often only consider the "rainmaker" model of business development and question whether they can succeed.

Challenges/Strategies for Law Firms

- Communicate expectations to associates that business development is part of the practice of law.
- Communicate that there are different styles of business development that fit different types of personalities.

- Break the baby-bird syndrome.
- Focus on billable hours and billings must be balanced by devoting time to developing new work.
- Encourage senior lawyers to involve associates in specific business development initiatives.
- Consider formal marketing training.
- Reward success – however modest!

4. Understanding the “business of law”

- Lawyers begin to develop an understanding of the business of law.
- Lawyers focus on the appropriate financial management of their own practice:

- Clear explanation of financial terms to clients
- Obtaining retainers, where appropriate
- Providing careful estimates of fees where appropriate
- Billing regularly
- Keeping WIP low
- Following up on unpaid accounts
- Meeting personal billing targets
- Regular review of personal and Firm-wide financial performance.

Lawyers begin to consider some of the issues that affect Firm-wide financial performance.

Challenges/Strategies for the Law Firms

- Clear communication of expectation of financial contribution of individual lawyers.
- Assessment of financial contribution as part of the associate review process.
- Help associates develop “financial literacy” by providing some financial disclosure and regular reports on the Firm’s productivity.
- Monitor delinquent docketers.

5. Transitioning to partner

Associates begin to consider these questions:[\[2\]](#)

- What do I need to do to become a partner?
- What are the criteria?
- Do I want to become a partner?

Challenges/Strategies for Law Firms

- Firm should have a clear written policy for advancement into partnership.
- The criteria should be specific and to the extent possible gender neutral in both language and application.
- The policy must be easily accessible to all associates.

De-Mystify the Process

- Firm leaders should hold a meeting open to interested associates to discuss the criteria and to answer any questions.
- Be clear about the timetable and who will be involved in the decision-making.
- Ask candidates to submit a plan/application so that all relevant information is available.

6. Becoming a “trusted advisor” to clients

- Becoming a “trusted advisor” to clients is, for many lawyers, the most satisfactory relationship of their professional career.

David Maister on the “trusted advisor”

“The role of the trusted advisor is to be helpful, provide guidance, input and counseling to the client’s own thought and decision-making processes...

The trusted advisor views the relationship with the client as long-term, not transactional.” [\[3\]](#)

Challenges/Strategies for Law Firms

- The trusted advisor is valued for his or her judgment.
- Trusted advisors are collaborative and sensitive to clients' needs. Can these qualities be taught?
- Can law firms facilitate the development of trusted advisors?

7. The “big shift”: focusing on the success of others in the Firm

- Lawyers are generally encouraged to focus on their own career and on their personal success.
- The “big shift” comes when lawyers begin to actively contribute to the success of others in the Firm.

A significant number of lawyers never
make the “big shift.”

Challenges/Strategies for law Firms

- Helping others succeed leverages effort by raising performance of a number of lawyers within the Firm. [\[4\]](#)
- Contributions can be leveraged through group marketing, cross-selling, building client teams, institutionalizing individual expertise, and acting as an effective mentor.

Contribution can also be leveraged through the assumption of leadership roles within a Firm such as Practice Group Leader, Executive Committee member, and Managing Partner.

8. Planning for the eventual retirement from the Firm and the practice of law

- Lawyers begin to contemplate life after law. The impending transition creates anxiety.
- Law firm leaders begin to encourage succession of clients and practice areas. Lawyers worry about the impact on their compensation.

- Lawyers consider who should “inherit” their clients and practice.
- In the final stage of their career, some lawyers become the “éminence grise” of their Firm and find great satisfaction.

Challenges/Strategies for the Law Firms

- Develop expectations that lawyers will provide a reasonably long lead-time of notice of retirement.
- Conversations about succession should start years in advance of anticipated actual retirement.
- A clear succession plan needs to be developed for client and practice areas.

- Firms need to consider active steps that need to be taken. What expertise and relationships need to be developed during the transition period?
- Is there individual knowledge in the retiring lawyer that needs to be institutionalized/passed on to others in the Firm?

- Could the individual lawyer benefit from some independent financial planning advice or coaching on a “post law” life?
- Compensation should not act as a disincentive to passing on clients/practices in accordance with a Firm-approved plan.
- Should the Firm and lawyer consider a “step-down” arrangement as a transition?

Issues Relating to Women Lawyers

- Gender stereotypes.
- The maternal wall.
- Lack of role models and champions.
- Exclusion from the boys club.

Challenges for Law Firms

- Law firm leaders need to make the business case for change.
- Ensure that all policies are gender neutral and easily accessible.
- Be clear about the impact of leaves.
- Make sure that women are getting adequate exposure and opportunities for valued work assignments.

Footnotes

- [1] See the useful series of articles by Ed Poll, “The Seasons of Your Career” published on CBA PracticeLink.
- [2] See generally, Warren Smith, “From Associate to Law Firm Partner”, The Lawyers Weekly, 8/18/11.
- [3] “Do You Really Want Relationships?”
<http://david.maister.com/articles/2/80>.
- [4] Presentation by Tim Leishman of FirmLeader at a Practice Group Leader Workshop.

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