



# Law Firm **Business Executives**

Hiring the Best

An Altman Weil Special Report

by James S. Wilber

Altman Weil, Inc.

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By James S. Wilber, Altman Weil, Inc.

James S. Wilber is a principal of Altman Weil, Inc. He leads the firm's Executive Search practice and has placed hundreds of high-level law firm executives and business managers over more than two decades. He advises law firms and corporate law departments on organization, structure, management and leadership.

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# Introduction

## **Many Things Change, Sound Principles Stay the Same**

### *A Brief History of Law Firm Business Management and Executive Leadership*

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It has been nearly 50 years since the advent of law firms profiting from the deployment of business managers to oversee and run their important business functions. What started slowly has resulted in the establishment of a professional approach to law firm management, and indeed, the creation of a new professional discipline, i.e., law firm business management.

Altman Weil has been involved with law firm administration and administrators since the very beginning. Founded as the first consultancy focused exclusively on legal organizations (law firms and law departments), we saw, early on, the need to get business management in the hands of professionals who were charged with ensuring that the finance, HR, IT and other important functions of firms are executed with excellence. This meant two things that still inure to the benefit of firms today – freeing up important practicing lawyers to serve clients and generate revenue, as the business and administrative efforts of firms were delegated to others, and delegation of the work to those better trained, educated and suited to the tasks at hand than are most lawyers.

The profession of law firm business management is thriving. An entire professional association of those who do this work – i.e., the Association of Legal Administrators (ALA) – has grown into an international organization with thousands of members. ALA was founded in 1971 by Mary Ann Altman and Robert Weil to provide support to professionals involved in the management of law firms, corporate legal departments and government legal agencies, and for several years the fledgling association was run out of Altman Weil's offices. Once it had established critical mass, the ALA was spun off into the independent organization it is today.

Fueling the growth of law firm business management has been the increasing specialization of business managers themselves. Early administrators were jacks-of-all-trades who oversaw and often handled the functional areas of finance/accounting, HR and IT. As firms began to see the benefits of hiring business managers, the numbers

grew and with them, the ability to allow for specialization. Firms often would have a principal administrator, but they also started to employ managers who specialized in HR, in finance and in the growing use of technology.

By the late 1980s, a new functional area, that of marketing, was added to the duties handled by law firm business professionals. Since then, a panoply of other functional areas and highly specialized managers have come to the fore – marketing morphed into both marketing and business development, pricing became a new area of focus, legal project management and process improvement took hold, practice groups within law firms began to hire their own business managers to oversee the business functions related to those groups, and IT has developed several sub-specialties, including network administration, cloud computing, and the existentially important focus on cyber security.

Despite these changes, certain principles by which effective law firms manage their business functions have stayed the same. The ensuing special report discusses several of them in more detail. Some of the chapters, for example the first one on a firm's readiness to utilize professionals to manage their business, apply mostly to smaller firms. Most of them, however, have lessons that will be helpful for firms of any size. This is so because, overall, as set forth in the following pages, it always is important that firms themselves are ready for hiring business managers, know what skills sets to look for when searching for them, understand how to structure the firm's administration, and make certain that no one loses sight of the need for business managers to add value to the firm itself, and to help it maintain its profitability and ability to thrive into the future.

I hope that you find the report useful in your efforts to manage your law firm as professionally and effectively as possible – and to hire superior business executives to assist you.

— *Jim Wilber, Altman Weil, Inc.*

# 1 | If You're Not Ready to Take the Plunge, Don't Dip Your Toe in the Water

*If a firm is not able to trust a non-partner to have a large role in its business management, they are well advised not to seek a high-performing, top-level administrator in the first place.*

**By James Wilber, Altman Weil, Inc.**

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By far the most important factor bearing on the success of a law firm principal administrator is the degree to which the firm is ready, willing and able to delegate the requisite authority needed to carry out the responsibilities of the position. Loading up an administrator with important job duties without the authority to make the tough decisions and actively manage the firm's administration is unfair to the administrator and to the firm. This issue is accurately described by a cartoon I saw years ago. Its message: "If you want a manager to do a job, give her the authority she needs. If you want to do a job on a manager, give her the responsibility without the authority."

Obviously, law firm partners are bright and insightful. Sometimes, however, they know less than they think they do about how the business of a firm should be handled. This, coupled with the personality makeup of most lawyers, can result in a very challenging work environment for 'non-lawyers' in law firms. Administrators – outsiders to some partners – are viewed with skepticism. That means that many partners are not inclined to delegate much authority to the administrator in the first place, and thus, an administrator's ability to establish trust and credibility with a firm's owners is a *sine qua non* to effective job performance.

Every firm falls somewhere on a spectrum, in terms of its willingness to delegate broad authority to its principal administrator. Progressive firms understand that if the hiring is done correctly, their administrators are better trained and more experienced at handling the business management activities of the firm than is any partner. Progressive firms thus delegate as much authority as they do responsibility.

Firms on the other end of the spectrum simply don't get it. Either they fail to understand the important management principle underlying the issue, or they are

accustomed to having practicing lawyers handle the firm's administration and don't understand that a trained business manager can do it cheaper, faster and better than most partners. At some firms the history of administration being handled by lawyers is so engrained that they never will give anyone who is not a partner the authority needed to succeed in the position.

Which isn't to say that any administrator, no matter how well trained and experienced, can expect to walk in the door of a law firm and be awarded the authority (or responsibility for that matter) needed to do the job. Instead, that authority has to be earned through job performance and over time. All good law firm administrators understand that they have to prove themselves. They must establish credibility to earn the trust, respect and confidence of key partners before authority and decision-making power is delegated to them.

If a firm is not able to trust a non-partner to have a large role in its business management, they are well advised not to seek a high-performing, top-level administrator in the first place. Inevitably, there will be a mismatch between what the administrator can do, and what the firm will allow the administrator to do. The firm should save its money, and spare the unfortunate administrator the frustration of being thwarted in his or her efforts to help the firm succeed.

Of course, the ideal situation is to define the position clearly, hire the best administrator possible, and let that person have wide latitude in running the business affairs of the firm on a day to day basis. Doing so will result in a more profitable and better managed law firm, and the position will more than pay for itself. Far more.

# 2

## Skill Sets of Superior Law Firm Principal Administrators

*What a firm needs most in its principal administrator can of course change over time as circumstances at the firm change. So what is a firm to do in choosing among needed skill sets when it is hiring a new principal administrator?*

**By James Wilber, Altman Weil, Inc.**

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Principal administrators of major law firms typically oversee and are responsible for up to six different areas of operation:

1. Finance and accounting
2. Human resources
3. Information technology (IT)
4. Facilities
5. Marketing and business development
6. Office services

In some firms, one or more of these areas is not under the oversight of the principal administrator. The most common example of this is marketing and business development — functions that often are the bailiwick of the firm's chief marketing and business development officer to the exclusion of the principal administrator (i.e., when the CMO does not report to the principal administrator).

Each of the six functional areas can be broken down into component parts. Money matters, for example, relate to both accounting and finance (and analysis), and they typically are combined into one department in the firm. Human resources also has two primary components, the employee relations/employment function, and the benefits function. IT is IT; yet, as we know, it has taken on significant importance to the strategic direction and the basic operations of major law firms. The facilities function encompasses such things as the relationship with the firm's landlord, housekeeping and maintenance,

## 2 | Skill Sets of Superior Law Firm Principal Administrators

office space, lease identification and negotiations, and improvements to or build-outs of new or rehabilitated office space. We've already mentioned the two-pronged nature of the marketing and business development function. Finally, office services includes document production, messengers and delivery, mail and fax, copying, etc.

Clearly, finding one person with significant experience in all the above areas of law firm administration is difficult. The best candidates exhibit different mixes of experience in the relevant areas. What a firm needs most in its principal administrator can of course change over time as circumstances at the firm change. So, what is a firm to do in choosing among needed skill sets when it is hiring a new principal administrator?

The simple answer is to find the person with the best and most extensive mix of experience in the different functional areas, but in so doing, remain cognizant of the fact that not all areas are equal in importance. And, obviously, a firm needs administrators who are grounded first in the most important functions.

Without question the most important skill set for the principal administrator of any major law firm is finance and accounting. This is true even in firms that have high-level, accomplished chief financial officers or directors. As we've often heard it expressed, "If the finances of a law firm and its profitability aren't good, what else really matters?"

The essential reason law firms turn business matters over to non-partners is to improve financial performance and profitability by freeing up key lawyers to serve clients and earn fees, and by bringing in business people who are better trained than most lawyers to handle the various administrative functions. Thus, any principal administrator needs to understand the firm's finances and its profitability thoroughly, and he or she must be qualified to help lead the analysis of the financial figures.

Does this mean that a strong financial background alone is enough? No. Human resources and IT (the two functions usually listed as most important after finance and accounting) are critical to the success of any firm. Most firms need principal administrators who are good managers of people and excellent leaders. An administrator should understand the big picture of what technology can do for a firm, its lawyers and its clients. But a principal administrator who doesn't understand finance and accounting adequately is an administrator incapable of adequately overseeing the financial managers and the firm's finances themselves. He or she serves at his or her own - and the firm's - potential peril.

# 3

## The Importance of Prior Law Firm Experience

*Law firms are owner-operated businesses where the owners are on site every day, where they generally are extremely interested in how the business is being run, and where they often are loath to delegate authority to non-partners or non-shareholders.*

**By James Wilber, Altman Weil, Inc.**

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The question invariably arises during any search for senior law firm administrators and business executives: How important is it that candidates have prior experience working in a law firm?

Prior relevant work experience is an important consideration in the hiring of any employee, whether in a law firm or not. Employers obviously place some value on job candidates who have experience similar to the position in question. There is nothing surprising about that. Why, however, does the question take on added importance in a law firm setting? What makes law firms different from most other types of employers?

### **The Law Firm: An Employer Like No Other**

Law firms are owner-operated businesses where the owners are on site every day, where they generally are extremely interested in how the business is being run, and where they often are loath to delegate authority to non-partners or non-shareholders. Law firm partners or shareholders usually are bright and insightful. Sometimes, however, they know less than they think about how the business of a firm should be run. Usually they have little or no educational background in business or management.

The convergence of these phenomena, coupled with the personality makeup of most lawyers, result in a very challenging work environment in law firms for anyone other than the owners (and even then the work environment can be extremely challenging). Administrators -- outsiders to some partners -- are viewed with suspicion. That means that the partners don't want to delegate much authority to the administrator in the first place, yet when they do, any perceived lack of good performance is jumped on and often

### 3 | The Importance of Prior Law Firm Experience

blown out of proportion. Rightfully so, however, owners understand that anyone who is not generating revenue detracts from the profit that otherwise would go to owners. This “loss” of profit is even more unpalatable if the employee is not seen as a superior performer.

Thus, any new law firm administrator is in a precarious position from the very inception of employment. Contrast that with the fact that an administrator’s ability

to establish trust and credibility with a firm’s owners is a *sine qua non* to effective job performance and one can see that a prior law firm credential may help a new administrator over the initial hurdle.

There are other types of employers, of course, that are similar to law firms. Other professional service firms – such as those of accountants, engineers or architects – most immediately come to mind. Of these, accounting firms (especially where consulting practices exist in addition to tax and auditing practices) are probably most similar, yet still it has been our experience that business managers with previous experience in accounting firms can find it daunting to succeed in law firms. Often, their initial reaction is summed up by a question they utter early on: “What do you mean the partners won’t follow orders?” Incredulous, these new administrators learn that the question is apt not only with regard to a partner following an order from the administrator, but even from other partners who sit in positions of firm leadership. The reality is that owners of accounting and consulting firms are much more likely to willingly delegate authority and responsibility both to other owners and to the administrators who support the business.

Which leads us back to the question posed at the beginning: How important is it that senior administrator candidates have prior experience working in a law firm? In my experience of more than 20 years placing senior administrators in major law firms, the best answer is this: All else being equal, candidates who have previous experience working in law firms are more likely to succeed as employees in a new firm and are much more likely to perform well early on in the new job.

# 4

## Reporting Relationships

*Although there is no absolute right or wrong answer, getting it right is critical to the success of the administrative team and the firm's administration.*

**By James Wilber, Altman Weil, Inc.**

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A common question from law firms is whether all administrators should report to the principal administrator, who then reports to partner leadership, or whether to have two or more co-equal administrators who each report to the managing partner or executive committee. This issue usually arises in consideration of the reporting relationships of three positions: the principal administrator (i.e., COO or Executive Director), CFO and CMO.

Although there is no absolute right or wrong answer, getting it right is critical to the success of the administrative team and the firm's administration. The default position should be to have all administrative managers who clearly are a rung below the principal administrator in terms of experience and credentials, including the CFO and CMO if they fit that definition, report to the principal administrator. Many top-notch principal administrators will not take positions unless all administrative functions and managers report to them. This default position also typically is more effective as it reduces the number of direct reports to partner leadership and makes it clear who is accountable for all the firm's administrative functions.

Where, however, a firm has a CFO or CMO who performs on a par with a top-flight principal administrator, firms are much more likely to consider having one or both of them report directly to the Managing Partner or Executive Committee (or Marketing Partner, for CMOs, where firms have a partner in such a role). The larger the firm, or the more sophisticated its operations, the more likely that it will have two or more co-equal reports to the managing partner or executive committee from among the senior administrators. Under any circumstances, however, this is a very important issue and one that has to be gotten right to avoid hard feelings and a dysfunctional administrative leadership team, or worse.

# 5 |

## Reporting Relationships Go Both Ways

*The firm must also consider the next link in the chain – the relationship of principal administrator to his or her direct reports.*

**By James Wilber, Altman Weil, Inc.**

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For the principal administrator of a law firm, there are two components to reporting relationships – to whom the administrator reports and who reports to the administrator. It's important for a firm to think through the reporting structure from the firm's partners down to the principal administrator. There are a number of factors which might influence whether the administrator should report to the management or executive committee, or if a direct report to the managing partner is advised. The firm must also consider the next link in the chain – the relationship of principal administrator to his or her direct reports.

Effective principal administrators will understand the importance of both sets of reporting relationships. Too much emphasis on relationships with partners (managing partner, executive committee, practice group leaders, etc.) and the administrator will not succeed as a leader and manager of the firm's administrative team. Similarly, any administrator who focuses too much on direct reports will never operate at the requisite strategic level in the firm and will be perceived primarily as a mouthpiece for the firm's administrative staff.

A good principal administrator can add enormous value to a law firm and free up partners to devote more time to client development and the practice of law. But this requires the creation of an organizational and reporting structure that meets the unique needs of the firm – and the selection of a candidate who can find the right balance to work with and be respected by all key constituencies.

# 6

## Who Should Conduct the Search for Your Next Principal Administrator?

*Our experience tells us that when incumbent executive directors or COOs lead searches for their replacements, ego too often gets in the way (albeit not consciously).*

**By James Wilber, Altman Weil, Inc.**

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Employers everywhere, including law firms, are in the midst of losing key employees to Baby Boomer retirements. During recent years, nearly half of the requests to Altman Weil to assist with executive searches for principal administrators (executive directors, chief operating officers, etc.) have arisen from the retirement of incumbents. In retirement scenarios (and occasionally in other situations), we see firms put the departing incumbent in charge of searching for his or her replacement.

This raises the question: who in a law firm is the right person to lead hiring projects for new principal administrators? Based on more than 25 years conducting executive searches for law firm administrators on more than 200 occasions, the answer certainly should not be the incumbent principal administrator (or, as discussed further below, the firm's human resources director).

Our experience tells us that when incumbent executive directors or COOs lead searches for their replacements, ego too often gets in the way (albeit not consciously). Who among us has the clarity of self-inspection to admit that we might have significant shortcomings that need to be avoided in the candidate who might replace us? Which of us has the ability to avoid the subconscious phenomenon that leads human beings to want to associate with people most like themselves?

The point is obvious – putting your incumbent administrator in charge of the executive search, no matter how good or effective the person has been for the firm, is too likely to be limiting. It is likely to undermine one of the primary goals in replacing employees – avoiding the weaknesses and duplicating the strengths of the incumbent being replaced.

## 6 | Who Should Conduct the Search for Your Next Principal Administrator?

There also are good – even better – reasons why the director of human resources should not lead the search for a new principal administrator. For one thing, the human resources officer will be a subordinate of the person being hired and shouldn't be privy to the most personal details of the candidate's life. For another thing, it doesn't make sense for anyone to hire his or her own boss. It would never happen in business, and so it shouldn't happen in the business affairs of a law firm.

A firm is best served by having the search led by the managing partner, chair, or even a member of the executive committee or board. Ultimately, the successful candidate will report to such a person and it makes sense to have the search handled by the person who will be the executive director's or COO's supervisor. Additionally, this has the benefit of giving the supervisor a stake in the success of the principal administrator being hired.

Nothing in this article is meant to suggest that there is no appropriate role in the hiring process for the incumbent or for the firm's top human resources officer. They should be asked to oversee things such as the collection of resumes, correspondence with candidates, scheduling of interviews, and the like. Additionally, the firm's current principal administrator or human resources director ought to be one of the people interviewing candidates and having input into the decision. But neither one should be the decision-maker regarding any of the important questions that will be faced: Whose resume deserves a second look? Who should be interviewed? Who should be considered a finalist for the position? Who should be hired?

# 7

## Ten Things That Make a Great Law Firm Administrator

*As the administrator's role continues to gain in significance, I believe it is more important than ever before to put in the time and effort to find just the right person for your firm.*

**By James Wilber, Altman Weil, Inc.**

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I'm often asked, what makes an exceptional law firm administrator? Having consulted to law firms on the topic of administrators and administration for more than 25 years, it's not difficult to answer that question — but it can be hard to find someone who has the right combination of skills and understanding needed to be successful. As the administrator's role continues to gain in significance, I believe it is more important than ever before to put in the time and effort to find just the right person for your firm.

Here is my list of the ten things that make a great law firm administrator:

- 1. The Mission of Administrators:** First and foremost, all law firm administrators need to understand that they, and the rest of the administrative managers and staff who work with them, are there for one essential purpose – to improve the firm's profitability. Administrators with specialized education and training will excel in functional job responsibilities that are not within the scope of most lawyers, and at the same time they will free up lawyers to better serve clients and generate more revenue. This is the whole reason law firms have turned to business managers instead of practicing lawyers to manage firm operations.
- 2. Law firm economics:** This leads to the second attribute – a sound understanding of law firm economics and the drivers of profitability. Even in firms that have true chief financial officers, the principal administrator must be cognizant of the economic issues and where profit comes from. He or she also needs to ensure that the entire administrative staff is aware of how they can add value to the firm and thus justify their own existence. See attribute #1.

- 3. Resilience:** Equally important to the first two characteristics of a great administrator is having thick skin. Law firms are challenging places to work. They are owner-operated businesses where all the owners work on site and where many of them spend time scrutinizing the performance of the administrative managers and staff. Enduring that scrutiny and the sometimes unpleasant partners who wield it can be a daunting task.
- 4. People skills:** The fourth important characteristic stems from the adage of knowing one's audience. Savvy administrators understand that, at least in general, lawyers behave differently than other people in several key areas of importance to their work lives. Personality testing reveals that in comparison to the general population, lawyers most often have a higher sense of urgency; are not thick-skinned themselves and don't take criticism well; are excellent conceptual thinkers, which, when coupled with their heightened sense of skepticism means that they are good at poking holes in the ideas and plans of others; are more introverted, and hence less enamored of a team orientation, than the general population; and they have a fierce sense of autonomy and don't take kindly to being told what to do.
- 5. Market knowledge:** Great administrators are conversant in the forces buffeting the legal services marketplace in today's tough competitive times. They are aware that deep changes are occurring in how legal services are delivered and they therefore are abreast of what other firms are doing in terms of pricing (alternatives to hourly-billed work); work and process efficiency (legal project management); the extreme importance of partner lateral recruiting (one of the only ways in which many firms are achieving growth and staying relevant); the scary environment related to IT security (protecting not only their own data and information, but that of their clients too); and how their firms can use issues like these to their own competitive advantage.
- 6. Leadership:** A great administrator understands the difference between management and leadership. He or she knows that hiring good managers in the underlying functional areas (IT, HR, etc.) is of critical importance, but that in them, and especially in the principal administrator, leadership is extremely important too. Leadership skills will enable the administrator to communicate the firm's vision and sell it to achieve buy-in throughout the ranks.

- 7. Management:** As a superior manager of people, a great administrator hires the best managers and staff possible, provides them with what they need to do their jobs, assists them where they need it, but allows each person to operate in their own areas free from micro-managing or other behaviors that mark insecure people. While allowing managers and staff the freedom to show what they can do, administrators also need to hold them accountable for their performance, and coach and mentor them toward achieving their goals.
- 8. Professional standards:** A great administrator understands the hallmarks of the legal profession and helps the firm manage its operations in strict compliance with the hallmarks. Those standards include: the laser-like focus on quality and getting it right; the overwhelming importance of confidentiality in general and client confidentiality specifically; and the fact that it is a hard-working profession and those who perform well, whether they be lawyers or administrators, work long hours and need to be available to the lawyers on an almost 24/7 basis.
- 9. Client service:** A superior law firm administrator appreciates the importance of superior client service. He or she also understands that for the firm's staff there are two sets of clients to satisfy – the firm's underlying clients, but also the lawyers and other professionals whom they are there to support.
- 10. Attitude:** Finally, like anyone in today's fast-changing world, a great administrator recognizes that to be able to not only withstand all the pressures, but to survive and thrive in the face of them, he or she needs to be engaged in a job that provides psychic and professional reward, that is important, and that is fun. Although they need to take their jobs seriously, they never should take themselves too seriously.

# Altman Weil Executive Search

One of the best ways to ensure your effectiveness as a law firm leader is to focus your management time on the firm's key strategic priorities — and to delegate operational management to a highly-qualified and experienced administrator. The importance of finding the right person to fill that critical role cannot be overestimated.

Over four decades, Altman Weil has developed a best-in-class process to identify, vet and select administrative candidates who will excel in a law firm environment. We work closely with law firms seeking executive directors, chief operating officers, human resources directors, financial directors and other high-level administrative personnel. We are not only broadly experienced in judging candidate qualifications, but we strive to match the individual with each law firm's unique culture to ensure long-term success.

## Altman Weil Executive Search includes:

**Position Design:** We meet with you to understand the firm's needs, discuss the role and responsibilities, develop or revise a position description, and advise on the most appropriate compensation range.

**Rigorous Screening:** We collect and review resumes, conduct a rigorous screening process, and hold a first round of in-person interviews with top candidates.

**Best Fit:** We prepare detailed written reports on each finalist and submit recommendations to the firm for their final interviews and decision.

Our philosophy in conducting searches for top-level law firm executives is to be highly selective at every stage in the process. We will never waste your time on a candidate who is not completely qualified. We lay the groundwork for you to make a successful choice in the most efficient and effective way possible.

Unlike search firms working for a contingency fee, we are only looking for the right candidate for the job. And we pledge to never recruit away an administrator we've placed in your firm. We work for you.

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**James S. Wilber** is a principal of Altman Weil, Inc. He leads the firm's Executive Search practice and has placed hundreds of high-level law firm executives and business managers over more than two decades. He advises law firms and corporate law departments on organization, structure, management and leadership.

Prior to joining Altman Weil, Mr. Wilber practiced law and managed law offices. His law office management experience is extensive: as a managing attorney in both the public and private sectors, he was responsible for the hiring, training, supervision and development of lawyers, paralegals and law office managers.

Mr. Wilber has written and lectured extensively on management issues in the legal profession. He has served as the editor of the *Report To Legal Management* and the Management and Technology Committee newsletter of the International Bar Association (and was a former officer of that committee). Mr. Wilber has been published or quoted in numerous publications, including the *ABA Journal*, *The American Lawyer*, *National Law Journal*, *Corporate Counsel*, and the journals of many state bar associations.

He is a Fellow of the College of Law Practice Management and is active in the Association of Corporate Counsel.

Mr. Wilber has a bachelor's degree from The University of Michigan and a master's degree in English Literature. He is a *cum laude* graduate of the inaugural class of the Southern Illinois University School of Law, having served as Notes and Comments Editor of the law review. He is licensed to practice law in, and is a member of the state bars of Illinois, Pennsylvania and Michigan. He is admitted to practice before the U.S. Supreme Court.

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