

Attaining – and Keeping – Your Seat at the Table

Law firms are turning to legal administrators to help partners navigate the unprecedented economic obstacles that are impacting the entire profession. In turn, administrators are earning more than recognition; they are earning and keeping seats at the senior management table by contributing to their firms' growth and longevity.

BY ARI L. KAPLAN



The principal administrator's role in a legal organization continues to evolve. Now more than ever before, administrators have a variety of opportunities to stand out and be recognized as vital strategic assets to their firms. Firms need administrators to showcase their talent and leverage their influence to help the partners steer their organizations through economically troubled waters and to ensure their long-term success.

TAKE INITIATIVE

After the terrorist attacks on September 11, 2001, destroyed the offices of 200-lawyer Harris Beach PLLC on the 85th floor of World Trade Center Tower Two, Kim Swetland, then an administrator at its main office in Rochester, New York, was responsible for leading the rebuilding of the firm's Manhattan office. She relocated to help the firm regain its footing in New York City and is now the office's Director of Administration.

The trust she had gained during her then-13-year career with the firm had earned her a "seat at the table" with management and their confidence that she could handle such as critical endeavor.

"As a leader, there is something to be said for being the type of person willing to jump in and help out in any occasion," said Swetland, a member of the Association of Legal Administrators (ALA) and President of the Association's New York City Chapter. That type of initiative is often a hallmark of legal professionals who effectively distinguish themselves during an economic downturn or other crisis.

BE PREPARED

Before each monthly management meeting at nine-lawyer Croley, Davidson & Huie, PLLC in Knoxville, Tennessee, Business Manager and Controller Scott Dotson, CLM, CPA, reviews the agenda and current financial statements. He also identifies the top personnel, employee benefits, facilities, and technology issues affecting the office.

"When the partner looks at you, you want to have an answer," he said.

Effective administrators must demonstrate an awareness of and familiarity with the firm's most pressing concerns.

"Show that you have developed an in-depth knowledge of law industry issues facing similar sized firms," said Dotson. Be prepared to discuss costs, budgets, and operational impacts, he added, noting that if you do not have an answer to a partner's question, "Find it and get back to him or her by the end of the day."

BUILD TRUST

Such thoughtful approaches and reliability help to build reputations for accomplishment among legal management professionals.

"Getting a seat means getting to the point of being respected," said Steve Wingert, CLM, Executive Director at 80-attorney Marshall, Gerstein & Borun LLP, an intellectual property firm in Chicago, Illinois. "Perhaps I'm not an equal partner in the firm, but in many ways I'm viewed as having the big picture or global knowledge and experience that will make the firm better."

Large projects, such as an office move, offer administrators the opportunity to showcase their managerial capabilities, as well as the chance to work side-by-side with other senior members of the organization. Swetland built trust through experience and by demonstrating her reliability at a time when the firm needed her most.

"One of the best ways to establish trust is to be true to your word," said Swetland. "It is having your actions match your communications." An administrator is often an island within the organization. Unlike the partners, there is often only one person in that role. As such, each individual builds a delicate balance of relationships.

"You have to establish your credibility, which means finding solutions and making good decisions," said Swetland.

Richard "Dick" Nigon, CLM, the Chief Financial Officer at 260-lawyer Robins, Kaplan, Miller & Ciresi

LLP in Minneapolis, Minnesota, has become so adept at interpreting the firm's partnership agreement that he and the managing partner are the two most trusted sources on its contents. He encourages administrators to review and understand their firms' key documents. In his 21 years at the firm, Nigon also helped to create, and now administers, the firm's retirement plans. He is a critical resource for this information as well.

one has achieved mastery of the 56 competencies ALA has identified as essential to managing a law firm or legal department.

"People take you more seriously when you know your game," said Esposito, who earned his CLM in 2006. Dotson, who also earned his CLM designation, added, "You must show competency in the areas on which you are advising the partners."

The question facing a law firm's partners is no longer whether a principal administrator should occupy a seat at the table with senior decision-makers. Modern operation and management of law firms make it a necessity.

"It is not just one thing you offer to add value; it is a series of things you can do to gain their trust," he said.

Nigon is developing competence in the latest hot topic in large and mid-sized firms: associate compensation and the elimination of lockstep promotion. He regularly attends meetings and webinars on these topics. As a result, the firm has asked him to craft its policy and new financial model.

"It is not reacting, but being proactive and being familiar with what is going on in the industry," he said.

EMBRACE EDUCATION

Familiarity with subject matter that is integral to your job is an essential component for success. Frederick Esposito Jr., CLM, Director of Administration for 64-lawyer Meyer, Suozzi, English & Klein, P.C., in Garden City, New York, recommends that just as attorneys have continuing legal education requirements, administrators need to hold themselves to similar standards.

"In our positions, we have an obligation to stay current," he said, citing seminars on human resources, financial management, and other areas because trends are always changing.

ALA offers the Certified Legal Manager (CLM)SM designation, which provides legal management professionals with a broad-based education in all matters related to managing a law firm. Passing the CLM exam is acknowledgement that

In addition to law-related knowledge, learn the financial side of the firm, other than billing and collection, including the issue of profitability, suggests Sharon Abrahams, the National Director of Professional Development at Foley & Lardner based in Miami, Florida.

"Understanding how to look at the numbers is a first step to speaking to your leadership," she said.

ENGAGE THE PARTNERS

Once you have sufficient knowledge of the aspects of the firm that are most valuable, Abrahams, a Past President of ALA's South Florida Chapter, recommends creating a presentation that highlights your fluency with the material. She also encourages learning the elements of a proper business and strategic plan for the firm.

As part of that effort, approach individual attorneys who are working on a new project, managing a new client, or responding to a request for a proposal, and ask how you can help to prepare a profitability analysis or other finance-related document that will help to set the strategy.

Abrahams also encourages administrators to learn about the type of marketing and business development support that attorneys need. In fact, she says that if there is no marketing department, the administrators should assume this responsibility. "Supporting marketing is another way to add value," she said.

MARKET DYNAMICALLY

You also have to market yourself, but in a genuine and positive fashion. Administrators who identify their strengths and apply them regularly to key projects will naturally raise their profiles.

“The only way to show value is for you to understand what value you bring,” Abrahams said. “It is your responsibility to change the perception; the lawyers will not.”

Part of that transformation in perception is to connect with others in a meaningful way. In fact, Abrahams recommends that administrators help lawyers to connect with each other.

“Exactly what we want lawyers to do, we want administrators to do, but the lawyers are the administrators’ clients,” she said.

Despite having 17 years of legal experience with 55-lawyer Fellers, Snider, Blankenship, Bailey & Tippens, P.C. in Oklahoma City, Oklahoma, ALA 2009-2010 President Susan French Koran realized when she became

the firm’s Director of Administration that she needed a network of other administrators to whom she could turn to ask questions.

“Whenever I need more information on something, I will tap one of my colleagues in ALA,” she said.

Swetland recommends making professional development and building relationships (with people, organizations within the community, and business partners) a priority.

“It is important to align with colleagues and organizations that can help you be successful,” Swetland said. “As administrators, networking is key to our success.”

That networking includes social media and online interaction.

“I find that I use LinkedIn regularly,” said Esposito, an ALA Regional Officer. A member of several LinkedIn groups related to law firm management issues, Esposito regularly answers questions on his chapter’s listserv. Esposito encourages his peers to join the dialogue because

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to knowledge, resources and networking



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- ◆ Enhances your value to your organization.
- ◆ Saves your firm money on its professional liability risk insurance.*

For more information about the CLM program, visit www.alanet.org/clm

*Visit www.alanet.org/clminsurace.html for a complete list of participating states

it builds credibility and offers members an ideal forum in which to network.

“How I am viewed outside my firm has done a great deal to bring stature to the position within the office,” added Koran. “When others look to you as a leader in the industry, your firm will do so as well.”

TAKE THE LEAD

As a leader, you should remain focused on the firm’s short-term goals and long-term strategic plans. Swetland notes that you must also accept responsibility for the duties of the position and hold yourself accountable to the organization, including finding solutions, supporting the firm in the evolution of its practice areas, and managing in economically challenging times.

Swetland says she strives to identify contributions she can make to bring revenue into the firm and ways that she can better manage or reduce expenses. This could mean assuming responsibility for a project as a billable timekeeper (consultant) or implementing new technology that will increase efficiencies by reducing expenses or capture cost-recovery aspects.

Administrators must understand the personalities

and the decision makers, notes Wingert. Identify an overarching vision and strategy where the firm can be more efficient, create savings, enhance business development, develop its people, and leverage technology.

“You have to take the lead and not be afraid that you will offend someone,” said Wingert. “Sometimes that requires a little bit of lobbying in the back hall.”

Ultimately, “lack of confidence or courage sometimes holds people back because they are looking for the invitation to take a seat,” said Koran. “The administrator needs to assert himself or herself as having the necessary ability.”

MAINTAIN YOUR SEAT

While administrators can compile a record of accomplishment, a single mistake can put your seat in jeopardy, cautions Esposito.

“If you make a mistake, admit it and then leave it alone,” he said. The admission itself reflects on your character and earns you tremendous credibility.

That said, once you have a seat, “You have to keep producing good work and staying at the forefront of the issues,” advised Wingert. You also cannot be afraid to highlight issues for the executive committee. “I maintain my

ABOUT THE ASSOCIATION OF LEGAL ADMINISTRATORS



Headquartered in the Chicago suburb of Lincolnshire, Illinois, the Association of Legal Administrators (ALA) is the world’s

largest and most influential organization representing legal management professionals.

Formed in 1971, ALA supports professionals involved in the management of law firms, corporate legal departments, and government legal agencies. ALA provides abundant educational opportunities and services to more than 10,000 members representing more than 6,000 employers in 30 countries.

ALA’s mission is to:

- promote and enhance the competence and professionalism of all members of the legal management team;
- improve the quality of management in law firms and other legal service organizations; and
- represent professional legal management and managers to the legal community and to the community at large.

ALA’s Membership

Members of the Association are law office administrators who are leaders and industry experts on legal management issues such as finance, human resources, systems and technology, facilities, marketing, and practice development. Regular membership in ALA is open to any full-time administrator or support manager who is employed in a private law firm, corporate, government or university legal department, or charitable legal agency. Associate membership is available to certain individuals. Membership is not open to vendors or consultants.

ALA is structured into six regions with 100 chapters in the United States, Puerto Rico, Canada, and New Zealand.

ALA’s Demographics

- 95 percent of ALA members live and work in the United States.
- 93 percent are employed in private law firms.
- 76 percent are female; 24 percent are male.

value by always pointing things out,” he added. When you arrive somewhere new and have to re-establish the seat, you must maintain confidence in your skills and abilities.

Koran notes that the smaller the firm, the more difficult it may be to earn a seat at the table because there is more involvement by the attorneys in the direct management and operation of the office.

“Enhancing profitability and efficient operation is one of the characteristics of getting a seat at the table,” she said.

Even after one has established oneself, maintaining that position in light of the election of a new managing partner or president can be a challenge.

“Leadership changes dictate regrouping,” said Koran. “We must adapt to a variety of management styles that occur during the tenure of our employment.”

To encourage that adaptability, she recommends that administrators and the managing partners with whom they work attend an executive officers retreat or conference. For example, the American Society of Association Executives hosts periodic CEO symposia, during which individuals spend two days learning each other’s management styles and identifying ways to highlight their respective strengths and minimize their weaknesses. That self-

reflection is critical for effective collaboration and natural self-promotion.

LOOKING AHEAD

The question facing a law firm’s partners is no longer whether a principal administrator should occupy a seat at the table with senior decision-makers. Modern operation and management of law firms, coupled with the transformation of the entire industry, make it a necessity. Administrators can create such opportunities for themselves through reliability, leadership and thoughtful, strategic interactions with their colleagues. ♦

about the author



Ari L. Kaplan, an attorney and author of *The Opportunity Maker: Strategies for Inspiring Your Legal Career Through Creative Networking and Business Development*, helps to cultivate dynamic and strong relationships among lawyers, administrators, and other legal professionals who want to achieve long-term career success. Download his special report, *Five Ways to Find Opportunity in a Faltering Economy*, at www.AriKaplanAdvisors.com.

- 67 percent have principal administrator job responsibilities.
- 74 percent work in firms with 1-74 attorneys.

ALA’s Educational Offerings

ALA, as your connection to knowledge, resources and networking, offers many outstanding educational opportunities for legal administrators of all experience levels. ALA’s Annual Conference & Exposition features more than 100 expert speakers, including law office managers, attorneys, and professors from leading management schools. In addition, more than 250 vendors display the latest products and services available to the legal industry. Other Association events include annual regional and specialty conferences as well as timely and topical Webinars. The Association also offers a certification program through which ALA member can earn the prestigious Certified Legal Manager (CLM)SM designation.

The latest developments, strategies and tactics in law office management are covered in ALA’s official journal, *Legal Management*. Other useful ALA publications include the

Association’s official bimonthly magazine, *ALA News*, and the twice-monthly e-newsletter *ALA Currents*. ALA also operates the Legal Management Resource Center (LMRC), <http://thesource.alanet.org>, an online resource filled with answers to critical legal management questions.

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