



# Management Diary

1 - 5 October 2007

As part of:



International  
Professional Legal  
Management Week<sup>SM</sup>

Produced by:

**MPF**  
Managing Partners' Forum



The Week provides a global focus for recognizing those in professional services firm management for what they do and the role they play in the success of their firm, and in its service to its clients and those who work in the firm.

Participating associations:





Nigel Knowles

**M**anaging partners come in all shapes and sizes. I come from the core legal discipline of my firm while others have a management background; some focus 100% on management tasks while others retain a heavy client workload; some regard themselves as gifted amateurs – others take great pride in their formal management education. Some volunteered enthusiastically for the role; others found responsibility thrust upon them. In truth, no two leaders are the same.

### **Common pressures**

Despite our differences, we share many concerns and challenges. We have to grasp the essence of a wide range of management disciplines, spanning marketing, HR, IT, finance, knowledge management, through to premises, facilities and operational issues. We often reside between a rock and a hard place. We face so many competing pressures and demands on our time: the needs of our partners versus the needs of the firm; the need to balance short term financial success with longer term investment; the distinct needs of 'support staff' who represent more than half the headcount at many firms; the internal needs of the firm versus the external needs of clients, regulators and the market.

### **Time – the most valuable resource**

It may not be politically correct to say so, but many people miss a personal handwritten diary. The association that I chair, the Managing Partners' Forum (MPF), has once again produced a Management Diary as our contribution to International Professional Legal Management Week. The Diary highlights the many challenges faced by busy managing partners and their management teams. It aims to provoke us into thinking critically about our role, our effectiveness and the way we use our time. It aims to raise wider awareness of the varied work and styles of managing partners. It includes inspirational thoughts and nuggets of management wisdom. Try to make it an uncensored account of your activities, thoughts and feelings.

### **Sharing your Diary with others**

If asked to describe their managing partner's role and timetable, you would probably get as many answers as people! So the left-hand pages contain a model diary to help de-mystify the role. Please copy and share them widely. The right-hand pages are for personal entries. Discussing these with colleagues may feel uncomfortable, but share as much as you can.

### **Management should not be left to managing partners**

Management challenges extend far beyond the firm's managing partner. The role of 'producer/manager' is one of the toughest in the professions. Practice and business group leaders, often with income and profit streams larger than medium sized firms, face many of the same challenges as the managing partner. Please encourage your leaders to use this Diary as a personal development and coaching tool, and to share their personal entries with their own people. You would be amazed at the improvement in internal communications.

I am looking forward to re-discovering the art of writing. I hope you feel the same way.

**Joint CEO, DLA Piper  
Chairman, Managing Partners' Forum**

PREPARING FOR THE WEEK

ABOUT THIS MANAGEMENT DIARY

The Diary should be a constant companion during this week. It will act as a guide and a coach – and also as your conscience. It will be a constant reminder of the need to tackle the plethora of management challenges and balance the competing demands on your time.

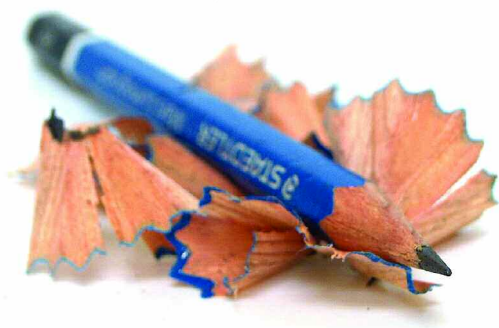
Goals for the week

Think about the particular goals you have for the week. To keep your eye on the big picture, note down longer term goals as well:

The week ahead		
Goal	Challenges involved	How progress and success will be measured
Short term – 3-6 months		
Medium term – One year +		
Long term – Three years +		

Problems to resolve this week

Description	What is the impact of the problem remaining unresolved?	What positive outcomes could be expected if it were resolved?



Management skills

Consider the management skills listed below. In which do you excel? In which would you, your management team, and/or your partners seek improvement?

Management area	My strengths	My weaknesses	Suggestions for improvement
Change management			
Communication			
Decision making			
Delegation			
Finance			
Human resources			
Information technology			
International co-ordination			
Knowledge management			
Leadership			
Marketing and business development			
Motivation			
Planning			
Project management			
Selling			
Strategy			
Team building			
Time management			
Work flow and process management			
Others			



## Quote for the day:

"The best leaders are the best note takers, best askers and best learners – They are shameless thieves"

**Tom Peters**



## Key questions to ask your partners today

What knowledge do we use to serve our clients? How can we add value to our client relationships through the creative use of our intrinsic and extrinsic knowledge? How can we capture, share and use our distinctive knowledge to achieve greater competitive advantage? How do we maintain rich, open ongoing informal interactions with our clients where we really add value? In what areas might we collaborate with clients to share and develop our knowledge? How can we harness our knowledge to identify and develop new products and services and win new clients and new business?

From: *Developing knowledge based client relationships – the future of professional services*  
– Ross Dawson

## Acronym reminder

<b>E</b> Envisioning	}	Charisma and behavioral attributes
<b>A</b> Activating		
<b>S</b> Supporting		
<b>I</b> Implementing	}	Management and administrative competencies
<b>E</b> Ensuring		
<b>R</b> Recognizing		

From: *How to manage organisational change*  
– D E Hussey

## Definition reminder



Shown below is an example of the diary of a perfect managing partner for a Monday. Complete your diary to see how it compares. At the end of each day note down your reflections and actions for the future.

Time	Appointment	Work
0800		
0830		Review day's schedule with secretary/PA
0900		Check e-mails and post
0930	HR – Progress on recruitment strategy	
1000		Review plan and minutes of previous meeting
1030	Business planning – Department A	
1100		Minutes of meeting. Follow up calls. Other telephone calls and messages
1130	Partner review meeting	
1200		Update my client and contact list on the firm's database
1230		Prepare agenda/notes for lunch discussion and afternoon meetings
1300	Lunch – New partner intake	
1330		
1400		
1430	Finance department update – Debtors and billing	
1500		Review financial summaries on the intranet
1530	IT Update – Learn facilities in new version of Office	
1600		Respond to emails and calls/messages
1630		
1700	Marketing and BD team – Review of plans	
1730		Walk around 2nd and 3rd floors to catch up on developments
1800		Run through with secretary for tomorrow's meetings – Delegation instructions
1830		Call home
1900	Client reception	



MONDAY

## My diary entry

Time	Appointment	Work
0800		
0830		
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1830		
1900		

## Actions to complete

Today:

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Later:

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## Reflections on my day

Effectiveness: Low 1 2 3 4 5 6 7 8 9 10 High

Enjoyment: 1 2 3 4 5 6 7 8 9 10

What I did today that was really different:

1

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## Management idea in a minute

Differentiate between those actions that are urgent and those actions that are important. There will be many calls on your time to deal with urgent things and these will often distract you from those important things that must be done but lack a particular deadline or appear only on your agenda. Produce a matrix showing high and low urgency against high and low importance. Whilst some urgent things will always demand your immediate attention, consider whether you are devoting sufficient time to the important things.

From: *The seven habits of highly successful people* – Stephen Covey

## Quote for the day:

"We are what we repeatedly do – excellence is not an act, but a habit"

Aristotle

## Key questions to ask your partners today

What are the key factors in increasing profitability, not just in the short term, but in the long term, within your firm?

From: *Profitability & Law Firm Management* – Andrew Otterburn

## Motivating thought

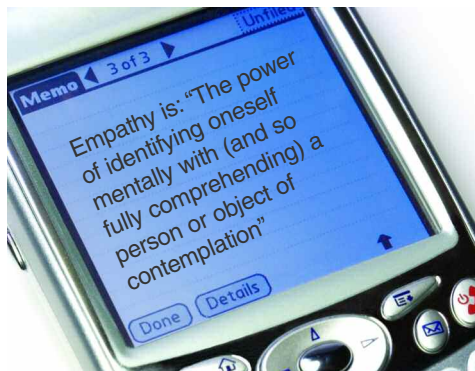
"The least likely to understand and accept the changes are the unsuccessful."

From: *Organization Theory: Selected Readings* – Derek Pugh

## Appraisal interview checklist

- ☐ Purpose and rapport
- ☐ Factual review
- ☐ Appraisee views
- ☐ Appraiser views
- ☐ Problem solving
- ☐ Action and objective setting

## Definition reminder



Shown below is an example of the diary of a perfect managing partner for a Tuesday. Complete your diary to see how it compares. At the end of each day note down your reflections and actions for the future.

Time	Appointment	Work
0800		
0830		Review day's schedule with secretary/PA – Check emails and post
0900		Travel to regional office – Read papers, make urgent calls
0930		
1000	Meetings with partners in regional office	
1030		
1100		
1130		Make urgent calls
1200		
1230		Brief on key local contact
1300	Lunch – key local contact	
1330		
1400		
1430		Travel back to office – Dictate notes
1500	Meeting – facilities team	
1530	Meeting – head hunters – brief on lateral hires	
1600	Appraisal for partner A	
1630		
1700	Appraisal for partner B	
1730		
1800	Meeting with PI insurers	Call in response to media enquiry regarding recent acquisition of two partners
1830		
1900		Preparation of speech for annual partner conference at home





**TUESDAY**

## Actions to complete

Today:

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Later:

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## Reflections on my day

Effectiveness: Low 1 2 3 4 5 6 7 8 9 10 High

Enjoyment: 1 2 3 4 5 6 7 8 9 10

What I did today that was really different:

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## Management idea in a minute

Greiner identified five specific phases of evolution and revolution. Each evolutionary period is associated with a dominant management style that achieves growth through that period: creativity, direction, delegation, co-ordination and collaboration. Each revolutionary period is associated with a dominant management problem that has to be resolved before growth can continue: leadership, autonomy, control, red tape and psychological saturation.

From: *Making sense of law firms – strategy, structure and ownership* – Stephen Mayson

## My diary entry

Time	Appointment	Work
0800		
0830		
0900		
0930		
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1030		
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## Quote for the day:

"It must be remembered that there is nothing more difficult to plan, more uncertain of success, or more dangerous to manage than the creation of a new order of things"

**Machiavelli**

## Key questions to ask your partners today

What information do I need to do my job? When do I need it? In what form? And from whom should I be getting it? What new tasks can I tackle now that I get all these data? Which old tasks should I abandon? Which tasks should I do differently? What information do I owe? To whom? In what form?

From: *Managing in a time of great change* – Peter Drucker

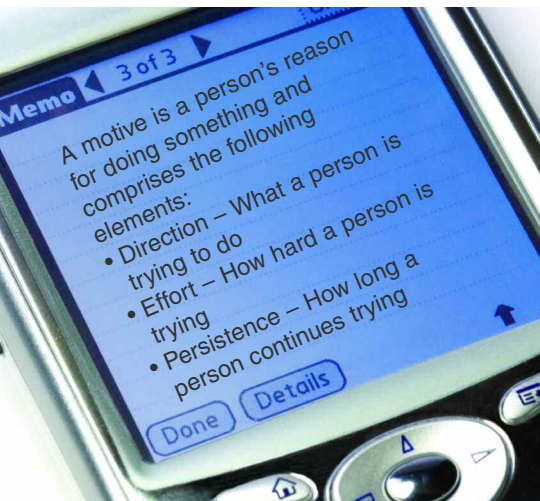
## Acronym reminder

GROW for coaching:

Establish **G**oal.  
Check **R**eality.  
Explore **O**ptions.  
Check **W**ill to act.

*John Whitmore*

## Definition reminder



Shown below is an example of the diary of a perfect managing partner for a Wednesday. Complete your diary to see how it compares. At the end of each day note down your reflections and actions for the future.

Time	Appointment	Work
0800		Review quality management
0830	FD meeting – Review of WIP and quarterly forecast update	
0900		
0930		
1000		Secretary regarding diary management
1030	Client satisfaction review meeting – Client A	
1100		Dictate notes
1130	Debrief Client A team	
1200	Remuneration committee meeting	
1230	Attend lunch time briefing by economists on likely changes for next five years	
1300		
1330		
1400		Add key points to partner conference presentation
1430	Meeting to review proposals for new web based packaged service for institutional clients	
1500		
1530		Solve short term critical resourcing problem for department A
1600		Set aside as emergency time for urgent crises
1630		
1700		Review monthly partners information pack – write introduction
1730		
1800	Meet with potential acquisition target	
1830		
1900		Have suit cleaned for MPF 2007 European Practice Management Awards 'black-tie' dinner and ceremony in London next week



## My diary entry

Time	Appointment	Work
0800		
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## Actions to complete

Today:

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Later:

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## Reflections on my day

Effectiveness: Low 1 2 3 4 5 6 7 8 9 10 High

Enjoyment: 1 2 3 4 5 6 7 8 9 10

What I did today that was really different:

1

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## Management idea in a minute

The essential strategic difference between the good-to-great and comparison companies ... First, the good-to-great companies founded their strategies on deep understanding along three key dimensions – what we came to call the three circles. Second, the good-to-great companies translated that understanding into a simple, crystalline concept that guided all their efforts (hence the term *Hedgehog Concept*) that flows from deep understanding about the intersection of the following:

1. What can you be the best in the world at?
2. What drives your economic engine?
3. What are you deeply passionate about?

From: *Good to great*  
– Jim Collins

# THURSDAY

## Quote for the day:

"Success is a lousy teacher. It seduces smart people into thinking they can't lose"

**Bill Gates**

## Key questions to ask your partners today

What percentage of your professional work time is spent doing things that a more junior person could do, if we got organized and trained the junior to handle it with quality?

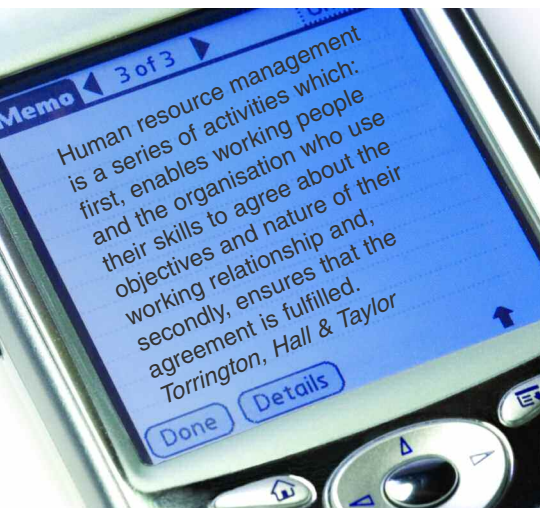
From: *Managing the Professional Service Firm* – David Maister

## Cultural moment

Cherokee tribe saying:

*Oh Great Spirit,  
grant that I may never find fault  
with my neighbor  
until I have walked the trail of life  
in his moccasins*

## Definition reminder



Shown below is an example of the diary of a perfect managing partner for a Thursday. Complete your diary to see how it compares. At the end of each day note down your reflections and actions for the future.

Time	Appointment	Work
0800	Visit potential venue for annual partners' meeting	
0830		
0900		
0930		
1000		Review day's schedule with secretary/PA
1030	Join interview for new head of knowledge management	
1100	Meeting – Business planning for department Y	
1130		E-mail staff on proposed new working practices
1200	Complete promotions list with HR	
1230		Prepare/briefing for lunch
1300	Lunch briefing with PR consultancy and trade journalist	
1330		
1400		Dictate notes
1430	Client meeting – reassure on quality procedures	
1500		Brief client partner
1530		Prepare proposals for lease renewal and refurbishment plans
1600	Meeting with property agents	
1630	Meeting with senior partner on quarter's results	
1700		Minutes of key actions agreed
1730		Urgent calls returned
1800	Visit the gym	
1830		
1900		Go home to spend time with the family

## Actions to complete

Today:

1

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Later:

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## Reflections on my day

Effectiveness: Low High  
1 2 3 4 5 6 7 8 9 10

Enjoyment: 1 2 3 4 5 6 7 8 9 10

What I did today that was really different:

1

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3

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## Management idea in a minute

People have preferred ways in which they best learn:

Stage 1 – Having an experience  
(Activists)Stage 2 – Reviewing the experience  
(Reflectors)Stage 3 – Concluding from the  
experience (Theorists)Stage 4 – Planning the next steps  
(Pragmatists)From: *Learning process and style* –  
Peter Honey

## My diary entry

Time	Appointment	Work
0800		
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# FRIDAY

## Quote for the day:

"Plans are only good intentions unless they immediately degenerate into hard work"

**Peter Drucker**

## Key questions to ask your partners today

What makes a good leader?  
Traits suggested by Kilpatrick & Locke include:

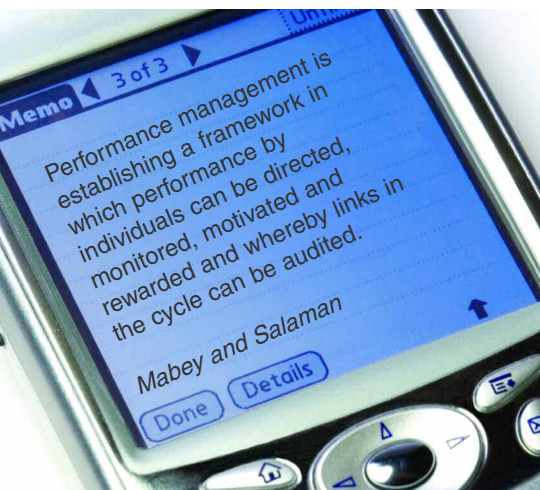
- Drive to achieve
- Motivation to lead
- Honesty and integrity
- Self confidence
- Ability to withstand setbacks
- Knowledge of the business
- Managing the perceptions of others in relation to these characteristics

## Research reminder

Harte and Dale researched the way clients judged service quality in accounting, architectural, engineering and consultancy firms and found the following factors:

- Reliability
- Tangibles
- Timeliness
- Assurance
- Fees
- Empathy

## Definition reminder



Shown below is an example of the diary of a perfect managing partner for a Friday. Complete your diary to see how it compares. At the end of each day note down your reflections and actions for the future.

Time	Appointment	Work
0800	Breakfast meeting with heads of support departments	
0830		
0900	Provide welcome address at client seminar	
0930	IT meeting on project management of new estimating software	
1000		Review day's schedule with secretary/PA
1030	Teleconferencing with overseas associates	
1100		
1130		Mediating partner dispute on a key client plan
1200		Contingency time – Set aside for dealing with urgent matters
1230		
1300	Lunch with major referrers of work	
1330		
1400		Update relationship partner
1430	Appraisal for head of department	
1500		Dictate notes
1530	Brief on quarterly results and strategy from department C	
1600	Meet new partner nominations	
1630		PA time – Work plan for week ahead Signing urgent papers
1700	Travel to and attend informal staff drinks	
1730		
1800		Pack bags for urgent weekend work Advise outcome of partnership nominations to heads of departments
1830		
1900		Review web for information on market changes – Travel home



## Actions to complete

Today:

1

2

3

4

5

Later:

1

2

3

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## Reflections on my day

Effectiveness: Low 1 2 3 4 5 6 7 8 9 10 High

Enjoyment: 1 2 3 4 5 6 7 8 9 10

What I did today that was really different:

1

2

3

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## Management idea in a minute

Last week a personnel director told me that the pervading atmosphere in his organisation – a large and well known one – was that of fear. Not fear of physical violence, but fear of stepping out of line, the fear of making a mistake, of offending the wrong person, of anticipating the boss and anticipating incorrectly. The most insecure place today, it sometimes seems, is inside a large organisation. Who knows for whom the bell will toll if this quarter's results are less than what was budgeted? The result is a world where eyes are turned down, heads are kept below the parapet and corridors of role-players keep their noses clean. Not the sort of place that is going to appeal to the adventurous and talented young, whom in strategy reviews, we say we so badly need. We need to look for quality in work and life, as well as quantity.

From: *Beyond Certainty* –  
Charles Handy

## My diary entry

Time	Appointment	Work
0800		
0830		
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Quote:

“Most boards are spending too much of their valuable time on internal operational efficiency (doing things right) at the expense of external operational effectiveness (doing the right things).”

From: *The New Marketing: Transforming the corporate future* – Malcolm McDonald and Hugh Wilson



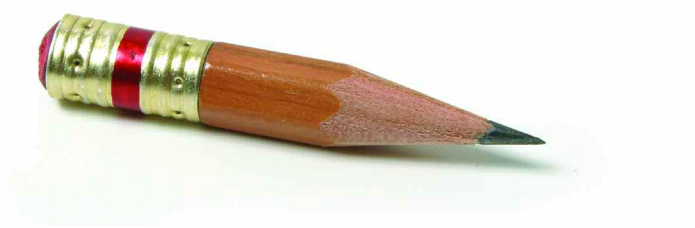
Reflecting on my week

My daily assessments were as follows:

	Effectiveness										Enjoyment									
	Low					High					Low					High				
Monday	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
Tuesday	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
Wednesday	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
Thursday	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
Friday	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
Overall	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10

Key thoughts, insights and ideas:

Monday	1
	2
	3
	4
Tuesday	1
	2
	3
	4
Wednesday	1
	2
	3
	4
Thursday	1
	2
	3
	4
Friday	1
	2
	3
	4



Looking back over the week, my time seemed to be split as follows:

Activity	Hours	% of time	Was this a good use of my time?
<b>BY FUNCTION</b>			
Partners & staff			
Clients			
Operations			
Finance			
Premises/Facilities			
<b>TOTAL</b>		100%	
<b>BY ACTIVITY</b>			
Reacting to problems			
Anticipating problems			
Exploring opportunities			
Planning for future success			
<b>TOTAL</b>		100%	

## Summary

Problems resolved:	Achievements:	Things that I learned:	Areas for improvement:
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4

## Bibliography

Jim Collins

*Good to great*

Stephen Covey

*The seven habits of highly successful people*

Ross Dawson

*Developing knowledge based client relationships – the future of professional services*

Charles Handy

*Beyond Certainty*

Peter Drucker

*Managing in a time of great change*

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*Learning process and style*

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*Making sense of law firms – strategy, structure and ownership*

Malcolm McDonald and Hugh Wilson

*The New Marketing: Transforming the corporate future*

Andrew Otterburn

*Profitability & Law Firm Management*

Derek Pugh

*Organization Theory: Selected Readings*

For details on buying any of these books visit [www.mpfglobal.com/books](http://www.mpfglobal.com/books)

## About the principal author

**Kim Tasso** BA(Hons) DipM FCIM MCIJ MBA is an independent consultant specialising in strategic and change management within professional service firms – with a particular interest in the relationship with effective business development. After starting her career in the technology sector, she held senior in-house positions at Deloitte consultants and Nabarro Nathanson lawyers before establishing her own practice in 1994. Since then she has worked with over 250 legal, accountancy, consultancy and property practices – both large and small – in the UK and internationally and developed a deep insight into the work of many managing partners. She is qualified in psychology, marketing, coach/mentoring and business management. She has published two books and written hundreds of articles. She is a regular speaker at commercial and partnership conferences. Further information is available at [www.kimtasso.com](http://www.kimtasso.com).



## MPF – The Champion of Practice Management



The Managing Partners' Forum is a members' association, dedicated to advancing leadership and enhancing the status of the management team in professional firms worldwide. Founded in 1995, the MPF brings together the views of the professions to support and influence the key management issues faced by the sector, as well as sharing knowledge, changing internal attitudes and providing advice. Further information is available at [www.mpfglobal.com](http://www.mpfglobal.com).

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