Clarifying Role and Communications With Office Managing Partners

QUESTION:

I'm the relatively new managing partner at a regional firm of about 400 attorneys. We have seven decent-sized offices, each with their own Office Managing Shareholder, each spending about 25% of their time on office issues. Over half of these folks were appointed by my predecessor and have been OMS's for less than two years. As with many firms we've been shifting the locus of our operations to a practice group configuration. Embarrassingly, we seem to have ignored this group such that we have never had a separate meeting of our OMS's for the past ten years. I'm looking to change that and plan a one-day session next month for these folks, but want to make it a "business day" with meaningful activity. Any ideas you can offer for agenda topics? What have the various firm leaders in your group done that has worked effectively for gatherings of this nature?

RESPONSE:

Like your firm, many law firms have shifted emphasis toward practice groups and away from local offices as the principal organizational structure responsible for delivery of service to clients. Notwithstanding this shift in emphasis toward practice groups, there are important roles and responsibilities for leaders of the firm's offices (referred to in this response as "OMP's"), and OMP's can be valuable members of the firm's leadership team.

Because the roles and responsibilities of OMP's are likely to intersect with those of practice group leaders ("PGL's"), it would serve the firm's interests (a) to define the roles of OMP's and PGL's by listing their expected leadership and management responsibilities and (b) to identify those areas of responsibility that are primary to the OMP's and the PGL's and those areas that are to be shared responsibilities. It would be reasonable for the firm to look to the OMP to perform a number of functions, including:

> *local promotion, business development and sales; control of an office-based budget for such activities (these budgets complement practice-group budgets);
>
> *a local role in partner recruiting and office growth, but guided by firm and practice-group needs (and coordinated with PGL's);
>
> *"den mother and chaplain" to local partners and their needs, an on-site oversight role in assessing partner performance, and a weather eye for aberrant partner behavior (in smaller offices, this role would extend to associates as well);
>
> *budgeting and oversight for office operating support and capital needs--from staff to

office space to equipment (much of this function likely would be performed by office administrators);

*responsibility for office morale and a positive work environment, which includes representing the "firm" to staff in multiple ways and leading partners in that direction;

*promoting the office's capabilities within the firm to foster cross-selling and cross-office staffing;

*serving as the "face" of the firm in the local community and coordinating community involvement among others in the office;

*serving as a "listening post" to help the firm's leadership gauge partner's views on matters of importance to the firm; and

*the most sensitive and time-consuming task of all--allocating partner offices.

Your question asks about the content for the first meeting of office leaders in your firm to be held in some time. We recommend holding regular, periodic meetings of the OMP's on a variety of topics, some of which are suggested below. Because your meeting will be somewhat different from a regularly held meeting, we suggest that the agenda include a detailed presentation on the state of the firm and its future plans. The OMP's can be effective allies to the firm's leadership, but only if they know and understand the firm's direction. Everyone in the organization, but key leaders particularly, should know the organization's mission and strategy and their individual roles in fulfilling it.

If the firm decides to list for its OMP's their leadership and management responsibilities, part of the agenda for regular meetings of the OMP's could key in on certain of the responsibilities. Thus, topics for regular, periodic meetings of OMP's could include the following:

*lateral recruitment

*lateral integration

*loss prevention responsibilities

*loss prevention partner involvement in the office

*mentoring and coaching of partners

*law firm and office economics

*marketing and public relations

*community involvement, arts, charities, industry groups, professional organizations *pro bono* obligations and opportunities

*managing productivity of associates and paralegals

*periodic meetings with important clients

*recruiting and managing administrative staff to assure that the office runs smoothly

*holding periodic meetings among partners in the office.

Using the OMP meetings to provide some form of training or education also could be desirable. Presentations from "experts" outside the firm on topics of interest to the OMP's, such as law firm economics or the state of the economy generally, might add value to the meetings.

The frequency of OMP meetings will vary from firm to firm. Quarterly meetings (via videoconference if possible) might be sufficient, but asking the OMP's to help decide on the frequency and proposed content of the meetings would also be advisable. We encourage you to consider holding joint meetings of OMP's and PGL's. This approach might contribute to OMP's and PGL's understanding that they are part of the same leadership team and might promote better communication and collaboration among them. Although OMP's and PGL's likely would convene in separate meetings from time to time, holding joint meetings would be a sound practice to help to encourage teamwork and discourage a "we and they" mentality.

We wish you every success with your meeting.

The LAB was formed as a resource to provide pragmatic advice to assist new managing partners with their critical burning issues and help them succeed. **The LAB** is comprised of the following distinguished current and former law firm leaders: Angelo Arcadipane (Dickstein Shapiro LLP); John Bouma (Snell & Wilmer LLP); Brian K. Burke (Baker & Daniels LLP); Ben F. Johnson, III (Alston & Bird LLP); John R. Sapp (Michael Best & Friedrich LLP); Keith B. Simmons (Bass Berry & Sims PLC); William J. Strickland (McGuire Woods LLP); Harry P. Trueheart, III (Nixon Peabody LLP); together with Patrick J. McKenna (Edge International).