This month:

- **Key roles for partners**
- **An essential element in Recruitment and Resourcing**
- **A few fundamentals for new enquiry conversion**

The Key Roles for Partners

In June 2016 I wrote a slightly controversial piece about realism in the partners strategic and operational roles within a law firm and indeed quoted a few examples where ego got buried and everyone benefitted from honesty and support for the people trained and developed and wanted to do jobs – in particular management and business development
http://professionalchoiceconsultancy.com/articles.php

Last week end I was in dialogue with some old colleague reminiscing over one of my great management experiences as a youngster - 600 staff of multiple disciplines, sales, engineers, warehousing, admin and accounts. Folks could never understand why I always put an hour aside on request to speak with one of the 100+ sales team. I did point out that he alone used to generate five times his annual performance quota. It takes a certain character to do that consistently. I moved on to bigger things and my successor put the guy in charge of one of the sales teams and as expected it was a complete disaster. Selfish characters do not make good managers and total lack of patience just about destroyed the team.

I also remember one of my most successful managers and quote his example frequently. He had a team of varying performing individuals, gave guidance and freedom of action to those at the top and focussed on lifting the others remembering of course that all teams have a worst performer that needs dealing with one way or another. His whole team as a minimum achieved quota and overall his team were consistent high performers.

This can of course translate into the legal profession.

Partners in law firms are in a unique role as owners, managers and workers and in the best interest of the firm and to do this effectively between them they need cards on the table and open declarations.

Three main headings:

- Personal likes and dislikes.
  - Fee earning – great performance and client satisfaction
  - Networking – getting out and about and generating advocates and referrers
  - Business development – planning, meeting prospects and asking for orders
- Skills and Training
  - There are so many lessons to be learned from the NHS, Local Authorities and Schools where people are put into management jobs because of their skills and not because they have the aptitude or indeed have been trained to manage. It has to be planned, assessed appraised and invested in. There are two parts to appraisals often not fully appreciated – yes performance but also development – more technical skills but also management or business development training.

    - There is nothing wrong with being the greatest technician and greatest fee earner
- Career Ambitions
    - High earnings
    - Management
    - Business Development
    - Work:Life balance
    - Retirement

The profitability of a business will be potentially so much greater with people doing what they are best at and what they want to do.

The law firm as a business cannot afford to stand still. It needs to grow with a definition of where and how and it needs to enhance working capital and profitability with efficiency, productivity and pricing and will only do so with the right people in the right jobs

Well we have our strategy, we have a stocktake of our key people and their areas for improvement and development. We need more people so how do we go about it…………………….

Recruitment & Resourcing

We are getting better at establishing objectives for the job role. Too often we are a bit casual about what skills and capabilities that we are after. If we are after a para legal, lawyer, supervisor or manager we tend to focus on their qualifications, fee earner performance and relevant PQE but not on the key items to fit with the ambitions of the business

- **Communication skills**
    - Written, verbal, presentation, ability to network, ability to engage immediately with the target audience and win their respect
- **Intellectual skills**
    - Ability to question, listen and assimilate the needs of third parties and even internal resources and promote the right solution from the firms range of services
- **Management Skills**
    - Yes people and the necessary delegation maybe plus the ability to get support and co-operation from staff not directly managed. Ability to measure performance, deliver projects to time and within budget and ability to manage their own time
- **Aspiration/Motivation**
    - The delivery and exceeding of targets and/or teamwork and participation. Development and promotion as a manager or as a high performing technical guru.
- **Emotional Factors**
    - The ability to be available for the demands of the job – additional hours at short notice, ability to travel.

We cannot expect anyone or certainly everyone to be 100% however we need to know the profile of what we want so that we can compensate organisationally or at least know we can develop to the ideal.

By adopting this approach we would save a great deal of time reviewing CVs, communicating with recruitment agencies but above all get much quicker performance returns. Value for money and a much happier business.

Of course, either as part of the appraisal process or separately we should match our existing staff against the above criteria making it clear what we are looking for and helping them develop.

New Enquiry Conversions

I wrote this piece before the Law Society Gazette published this in June

"70% of survey respondents unhappy with the quality of new business enquiries to their firm"

Again a very hot topic and I see response with culture, accountability, process, systems enhancement and even performance competition.

There are still however firms that do not know how many enquiries they have by department let alone conversion ratios

Hopefully we are all beginning to see the **Fundamental Need of the First Stage**

- The telephone needs to be answered quickly and enthusiastically
- The caller needs to be put at ease "Hi Mary, I am sure we can help you, perhaps you will outline what the issue is"
- The caller needs to feel confident in your interest and ability to do the job – "Mary, we can definitely help you, I would just like a few more basic facts to enable me to provide you with a sensible quote/estimate"
- The minimum data to produce a quote is all that is needed at this stage – not the inside leg measurement or passport number (more data can be captured later during the file opening process)
- The quotation needs to be produced in the very short term – verbal or written
- The quotation needs to be followed up quickly
- The order must be asked for – "would you like to proceed"
- When you get a "Yes" the you can ask for the balance of information enable client and file opening
- If you get a "No" it is fair to ask why you are not successful as it gives the opportunity to learn but also real time to handle the objection.
- More information for potential cross selling can be gathered as the matter is being worked or dependent on the work-type as it is finished.

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