This month:

- **A good lawyer – how do I become a manager – do I want to be one?**
- **The fundamentals for a department head**

First things first

We will take it as read that candidates are good at their initial primary focus and that is being a lawyer in a favoured work-type – commercial, private client or a mixture of everything.

What we do not have to take as read is that all lawyers have to become managers – it is also very different to being a partner/director/owner of a business.

As a lawyer there is absolutely nothing wrong in remaining as a lawyer getting incredibly good at the chosen craft and making a significant contribution to the business that way. One could extend contribution of course adding good image and profile to the firm by becoming an expert and presenter/author in a particular field or indeed becoming a prime networker and winning business for the firm that way – having a good relationship with prospects and of course clients (it also requires the confidence to ask for the order)

The roles above require focus and also allow the need to be a little selfish/focused in behaviour.

Choosing to be a manager is different. To do so many new skills have to be learned and the demands are such that so much time and effort has to be given away to the team of people working for you – constructively managing for success, correcting and developing performance and behaviour and always recognising that you have top performers, on target performers and always have a worse performer.

This differential is not just applicable to the legal market. Top salespeople do not generally make the best managers – there are roles for them generating the most revenue and winning prizes or managing key accounts and the same for top scientists who keep on inventing and developing or being professors imparting knowledge to others.

Becoming a manager will inevitably change the work:life balance and shouldn't be a decision taken lightly.

What do I need to do?

There is so much to understand and it needs a check list and a plan.

It obviously very much depends on the nature of the firm you are in and whether there is the opportunity to have an open conversation with the hierarchy and try and encourage a personal development plan.

Many firms are now beginning to take performance reviews and people development seriously. Those with the Investors In People (IIP) recognition have an established process and an increasing number of firms have an appraisal and review system that not only recognise performance on a 1-5 scale but also individual development recognition on a A–E scale. So a C3 is someone achieving objectives and targets regularly, a B4 with the right development could be promoted within 6 months and an E2 is limited with ambition and not achieving so remedial action is needed.

Some key criterial for a manager are;

- Management skills and the recognition of the need to delegate with clarity of demands and the core Managing Tasks Through People (MTTP)
- A desire to achieve and exceed team and department targets and ensuring that all of the team make their contribution. Often top performers in the team can succeed with general guidelines and a thank you and the regular effort has to be improving the performance of others.

As a legal department head there are some clear accountabilities

The scope is - To manage the performance of themselves and their teams against business targets, budgets, forecast and tasks.

The accountabilities are -

- To achieve billing performance of themselves and their teams at least to budget level and to grow performance in the short medium and long terms through development initiatives
- Cost reduction
    - To achieve Gross profit targets for their teams (which will encourage more efficiency, business analysis and case management configuration).
    - To ensure that the most cost efficient ways or working are adopted by both fee earners and support staff including ensuring that IT is utilised to the best effect in the department
    - To encourage more standardisation of documents and their automatic generation to improve efficiency and costs
- Ability to respond to relevant KPIs in order to have a real time impact on performance
- Responsibility for working capital and from improving time recording and billing routines – billing accuracy and timeliness
- Ensuring all supervisions and appraisals are completed
- Owning business development for their team – image, cross selling, new business and retention
- Owning compliance and their department contribution to Lexcel or CQS
- To be able to delegate responsibility realistically to team supervisors where applicable and to all other staff
- To directly manage secretaries and support staff allocated to the team
- Ensure that staff are being developed to assure the strategic performance of the firm.
- Ensure a strong client experience, minimise complaints and if they do occur effective response

Monitoring and Measuring Performance

A key aspect for the manager where some personal initiatives could put you ahead of the game and some of your colleagues

Firstly learn to differentiate between Key Performance Indicators (KPI) and Reports. Many systems these day allow the production of both. KPIs is data available daily on key measures – e.g. billable hours, billing for the team and individuals to enable action early enough to ensure monthly performance. Reports usually at month end and if the firm does not provide it extract the key numbers and look at historical trends, peaks and troughs to get you thinking about exploiting positives and recovering negatives with perpetual forecasting.

Managing the Team

It is important that everyone in the team understands what they are accountable for and there are regular discussions around the key areas. There is no point in advising someone at the annual appraisal that they have failed in these areas. A daily or weekly "well done" and "thank you" works wonders and likewise early conversations about needs and methods of improvement are important development items. There is also merit in sharing key statistics amongst the team as the highly performance motivated ensure they are top of the table and team members can learn from one another. A half an hour "prayer meeting" for the whole team once a week also works – key statistics plus shared improvement opportunities on the agenda

A Key Aid

I am afraid it's that IT thing. When you have a clear accountability for billing, working capital, gross profit and the like it does encourage the use of IT to help efficiency, productivity and communication. A good manager and potential manager needs to find out the available functionality within the firms IT product – practice, case management, document management and MI. It is scary how under-utilised many IT applications are and mainly from lack of knowledge of functionality certainly with the multiple releases and upgrades produced by the vendors. Make the account manager from your vendor welcome.

Business Development

Three aspects here

- The nurturing and cross selling to existing clients and trying to turn some of them into advocates and referrers – this requires good performance and effective communication with a simple plan on the generation of new business. Such as Will upgrades, LPAs to Will clients, conveyancing.

- New business generation. A good understanding of the benefits that your products and services are going to provide a potential client. A clear identification as to who that potential client may be. A definitive route with the benefits to get to the client either directly or through referrers. For example commercial benefits direct to SMEs or through a Chamber of Commerce or conveyancing through estate agent partners because 90% of them and their clients want speedy and effective performance.

- Handling the incoming enquiries which needs to be a responsibility for everyone in the team to make sure conversions are at 60%+ rather than the poor 20% in many firms

Enhancing Your Team

With everyone understanding what is expected of them and you giving regular reviews and guidance there will still be a need to recruit. Either because you have managed a non-performer out of the business, you want to expand the team because of marketing success or because some-one decides to leave which is hopefully because of a major career opportunity or personal circumstances – people do but hopefully you have capitalised on their way through.

Selection of new members of the team is critical – obviously a clear role and job description – do recognise that these are dynamic dependent on performance changes. You obviously want a high performing or potentially high performing candidate but you need to look at more than performance history – to get the right mix for the team you need to establish a need for communication skills (internal and external), intellectual skills (the job role but also the ability to match your solution to the client's needs) management skills (managing a file/case but also the ability to get co-operation from non-managed team/firm members), motivation (the desire to succeed and over perform), emotion (the ability to work the expected hours and geography).

No one is 100% so it is important that with any new members of the team you are aware of the areas requiring attention. I am also aware of team managers who once that have established the person profile actually talk their existing team through it in order to aid individual development plans

Now that you are aware of the outline needs there is much that can be done in helping yourself through your own initiatives, the right available resource in the firm and external courses for development – sales and marketing, MTTP, in particular and there are some old classic training films such as "The G.O.Y.A effect", "Who Killed the Sale" and "For Want of a Nail" and many more on U Tube.

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