

MANAGING A LAW FIRM WITHOUT LOSING YOUR SANITY.

INCLUDES THE MARINE CORPS LEADERSHIP PRINCIPLES

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A good manager is not born; they are trained. A great manager is born and usually the noisiest, most demanding child on the block. Even a great manager falls short in certain administrative areas. Some excel at managing paperwork or processes, others at managing staff and clients, which others excel at managing time and allocation of resources. If you can ever find a manager who can do all these – chain them in the basement of your firm and don't let them go.

IMPORTANT MANAGEMENT MANTRAS:

- 1) **Always keep your clients first.** A firm cannot exist without good clients. That is a short sentence filled with truth. The term "good clients" is a term of art. It takes years to learn to say "no" to those clients that make you uncomfortable. Never, never take a client because you need to pay the rent. Good clients refer good clients; while bad clients refer bad clients. Make sure the office policies are designed with the needs of the client in mind. Train staff to respect the golden rule the client pays in the success of the firm.
- 2) **Know where you are going.** It is rare that any business can be successful without someone at the helm mapping a course for the future. Crops would not grow without planning ahead. The same is true for a firm. Know your market, anticipate changes in the needs of your clients and don't be afraid to try something new.
- 3) **Always be a Professional.** You are an attorney 24-7. Never compromise your ethics, either in your professional or personal lives. A small chink in the strongest of armor leads to rust and ultimately destruction. Be a person of their word. Treat others (staff included) the way you want to be treated.
- 4) **Be an active participant in your firm.** It is impossible to anticipate the needs of your company if you do not know the day-to-day challenges faced by your attorneys, staff and clients. Have regular status meetings with everyone in the office. Discuss more than the caseload. Discuss current demands, lack of proper resources, and plans for the future. Involve everyone in your firm; after all they all have a vested interest in the firm's success.
- 5) **Share information.** Most mistakes are made because well-meaning employees were not given relevant information to make informed decisions. A bad manager is one that hides information; hoarding it like a squirrel reading itself for a long winter. That bad manager's perception of power is to keep everyone in the dark. This type of mismanagement leads to poor decisions, frustrated employees and a spiraling destruction of the firm.
- 6) **Be responsible for all decisions – yours and others.** See the Marine Corps Leadership Principles set forth below: *Seek responsibility and take responsibility for your actions.* A good manager takes the responsibility for all their subordinates' decisions. Never shift that duty to others. If there are mistakes, educate, supervise and monitor the new work. If the mistakes continue – hire someone who can follow your direction.
- 7) **Hire the right people.** Never hire on a whim. Avoid hiring friends or relatives. Know what your firm needs and take the time and energy to find the "right person". Always check references and consider using personality/temperament profiles as part of the hiring process. The two best known profilers are: MBTI (Myers-Briggs Type Indicator)

- and the Keirseley Temperament Sorter II (www.advisorsteam.com). MBTI basically sorts subjects into a specific personality type: extrovert vs. introvert; sensing vs. intuitive, thinking vs. feeling and perceiving vs. judging. The Keirseley realigns the Myers-Briggs types into four personality temperaments: Rationales, Idealists, Artisans and Guardians. The firm makes a tremendous financial and emotional investment in new staff. Those costs are normally hidden, therefore many times overlooked.
- 8) **Know your finances at all times.** "Best laid plans of mice and men..." Not having clients can kill a firm, as can mismanagement of finances. Never delegate of supervisory duty of your firm's finances to someone who has no vested interest in the success of the firm. Avoid leveraging your financial future. Instead, pay as you go (if possible). Always investigate the need for new purchases, but don't be so cheap that your staff is frustrated by out-dated equipment and/or tools.
 - 9) **Always market wherever you go and whatever you do.** Find a style of marketing that works for you. Teach, community speaking, billboard or TV ads. Each have their place depending on the style of practice your are promoting. Review marketing decisions based on changing needs of your clients or the profession. A firm that does not have a web site is shortchanging itself in this Internet driven economy.
 - 10) **Be prepared to make changes.** Do not sit on your laurels for too long. The phrase "why should I change, we have always done it that way" indicates a firm that is headed for bankruptcy. That attitude worked in the 50's, but is long dead today. On the other hand, never make changes for the sake of change. Plan, coordinate and educate on each change in the firm. Make sure your staff are on board, or at least willing to got with the new changes. If not, find out why not before showing them the door. Your clients' needs do not stand still; nor can your firm.
 - 11) **Be persistent.** Set well thought-out goals and follow through. Be willing to sacrifice short-term rewards for long-term gain. For example – rather than golfing today, write an article for publication in a professional magazine. Confucius said, "It does not matter how slowly you go so long as you do not stop." Truer words were never spoken. Other than the occasional volcano, nothing is built overnight. It took persistent planning to build huge ships, plant gardens or grow businesses. There is no guarantee that you will be successful, but you are absolutely guaranteed to be a failure if you stop.

THE EMPLOYEES: First let's focus on the different types of employees.

A golden rule – employees are people with vastly different needs and agendas. Never treat all employees the same. In order to manage them well you must understand the different types of personalities:

- 1) **The Boss.** This person has tried to control everyone around them from the day they were born. They corrected their teachers, organized charity drives at the age of 8 and played dictator whenever the circumstances would allow. This person loves to be in charge, feel valued for their opinions, never wants to be left out and wants to become an indispensable part of the firm. A manager needs to be aware of this person's goals and abilities. In the wrong place this person can be a volcano waiting to erupt. In the right place they can be the gem and mainstay of the office.
- 2) **The Introvert.** This person is quiet, constantly working, rarely late or absent. They avoid any type of conflict and takes direction for anyone. Rarely volunteers new ideas or complains. The most important thing for them is to keep a low profile. This person can become the foundation of a good team. These are the employees who stay with one

- employer for most of their working lives. It is very traumatic to them to be moved, even if it is deemed to be an "advance within the company". They can be groomed to be middle management, but rarely higher. Make sure to reinforce individuality and autonomy at every opportunity. Keep these folks away from the Bosses.
- 3) The Extravert. There is never a rainy day for this person. They may spend more time raising everyone's spirit than they do working. Their most important asset is the boundless energy and enthusiasm. With proper training this person can be taught to share their energy, while doing their job. The Extravert is great at dealing with people – other employees and clients. Put this person in a place of public exposure.
 - 4) The Trouble Maker. This person loves and lives for controversy. Skilled troublemakers are subtle. They cause events to occur without their superiors realizing the intentional act. Their goal is to cause pain to a person or disruption to a system so that they can be the cure for the problem. These folks will chase away good employees. It could take a manager years to discover a subtle trouble maker, unless there is good communication between all the employees and their managers. Be firm and consistent in dealing with these folks.
 - 5) The Temporary. This person gets bored easily, or enjoys changes in their environment. They move from job to job and town to town, without much planning. They rarely have any long-range plans. These folks are valuable for their skills, so long as those skills are needed for a very short time. Do not invest any long-range plans in this person. Never allow this person to design a system for your office, without one of the more permanent employees learning the system. This person rarely gives much notice before leaving.

THE JOB:

Before hiring anyone know what role you need that potential employee to play. If the position already exists, then ask the exiting employee to critique their assigned job and the other employees that are part of their team. If the job is new, then ask the other employees for their assistance in defining the role of this new job. Make sure that any new employee has the type of personality that fits the demands of the job. For example – to put an extravert into the basement library cataloging briefs would be a disaster for both the employee and the firm.

TEACHING:

A good manager is a good teacher.

- Not every manager/teacher knows every subject, but they do know where to find another teacher for that unfamiliar subject.
- A good manager/teacher is aware of the goals and demands on their employees and is always considering ways to help the employees accomplish those goals.
- A good manager/teacher is not willing to compromise quality for quantity.
- A good manager/teacher will not avoid reaching out to someone who is drowning.
- A good manager/teacher thinks outside the box.
- A good manager/teacher is not afraid of asking for help.
- A good manager/teacher is always willing to listen to new ideas and discuss changes that are reasonable.
- A good manager/teacher leads, but does not dictate, unless absolutely necessary.
- A good manager/teacher pays attention to everything and everyone.

- A good manager/teacher immediately addresses issues that make a difference in the management of the company and ignores issues that are temporary. Such as someone's tardiness because of a new child in the family, versus tardiness because of a lack of respect for the job.
- A good manager/teacher celebrates employee's successes publicly and disciplines privately.
- A good manager/teacher curbs inappropriate behavior in the very early stages. "One rotten apple spoils the entire bushel".

MANAGEMENT:

Once the Manager has determined that they have the right person in the right job, then move on. If the Manager has done their job well there will be little need to micro-manage. A valuable employee feels empowered when they know both their Manager and fellow employees respect their skills. To micro-manage is to say to that employee that the Manager has no faith in the employee's ability to perform their job. A good manager's job is to macro-manage. That is to have well defined roles for each employee and well reasoned processes in place. A good manager should be aware of the operation of the firm. In addition, they should be anticipating future needs of the firm. They should be viewing the operation of the firm from the top looking down, not the bottom looking up. A good manager needs to be familiar with all the jobs that he or she supervises. That does not mean that they could write a manual on the job, but at least they should understand the demands of that job. Anyone who has worked in the mailroom understands how complicated the process is, but someone looking in from the outside assumes that anyone with a first grade education could do the job. The latter shows a complete lack of understanding, which will lead to distrust between the Manager and the employees.

A MANAGER IS NOT A FRIEND TO THE EMPLOYEES, JUST LIKE A PARENT IS NOT A FRIEND TO THEIR CHILDREN. The manager's job is to guide, build, control, teach and maintain. If the manager is trying to befriend the employees this leads to jealousy (we cannot love all our employees the same). It also leads to anarchy when the manager tries to change roles from his or her "friendly" persona and become the Manager. Employees must be able to depend on a Manager being consistent, caring, and respectful, while being professional and a good leader.

Do not suffer a manager that hates their job on the firm's employees. That is a disaster waiting for a train wreck.

My husband is a Marine and has shared with me the basic principles of leadership that are taught to every marine. In truth, I find that each and every one of these principals applies to good leaders/managers in any business or organization – even us lawyers.

Marine Corps Leadership Principals:

- Know yourself and seek self-improvement.
- Be technically and tactically proficient.
- Develop a sense of responsibility among your subordinates.
- Make sound and timely decisions.
- Set the example.
- Know your marines and look out for their welfare.

- Keep your marines informed.
- Seek responsibility and take responsibility for your actions.
- Ensure assigned tasks are understood, supervised, and accomplished.
- Train your marines as a team.
- Employ your command in accordance with its capabilities.

Marine Corps Leadership Traits:

- **dependability** - the certainty of proper performance of duty.
- **bearing** - creating a favorable impression in carriage, appearance and personal conduct at all times.
- **courage** - the mental quality that recognizes fear of danger or criticism, but enables a man to proceed in the face of it with calmness and firmness.
- **decisiveness** - ability to make decisions promptly and to announce them in clear, forceful manner.
- **endurance** - the mental and physical stamina measured by the ability to withstand pain, fatigue, stress and hardship.
- **enthusiasm** - the display of sincere interest and exuberance in the performance of duty.
- **initiative** - taking action in the absence of orders.
- **integrity** - uprightness of character and soundness of moral principles; includes the qualities of truthfulness and honesty.
- **judgment** - the ability to weigh facts and possible solutions on which to base sound decisions.
- **justice** - giving reward and punishment according to merits of the case in question. The ability to administer a system of rewards and punishments impartially and consistently.
- **knowledge** - understanding of a science or an art. The range of one's information, including professional knowledge and an understanding of your marines.
- **tact** - the ability to deal with others without creating offense.
- **unselfishness** - avoidance of providing for one's own comfort and personal advancement at the expense of others.
- **loyalty** - the quality of faithfulness to country, the corps, the unit, to one's seniors, subordinates and peers.

I am not suggesting that you run your firm as a Marine would run his or her company, but I am suggesting that these principals fit well within all organizations.