

## 'Step Back And Get a Plan': Midsize Firms Compare Challenges at Conference

Firm leaders discussed associate retention, succession planning and business development ideas.

By Jonathan Ringel | October 31, 2019



**Panelists at the Legal Network Alliance conference in Atlanta included, from left, John Monroe of Cleveland's Mansour Gavin, Bill Acevedo of Oakland's Wendel Rosen, and David Taub of Toronto's Robins Appelby. John Remsen Jr. of The Remsen Group in Atlanta was a moderator. (Courtesy photo: Scott Schulten)**

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The website for the Legal Netlink Alliance (<https://www.legalnetlink.net/>), an association of dozens of midsize law firms around the world, promises that member firms enjoy client referrals, legal resources and personal relationships that lead to “a deep appreciation for the global commitment of the legal profession to the Rule of Law.”

The group dove into more nuts-and-bolts issues surrounding the business challenges of running a law firm, as seen during a recent conference at the Capital City Club in Atlanta. In one session, lawyers from three member firms—one from Oakland, California, one from Cleveland, Ohio, and one from Toronto—relayed their experiences around strategic planning.

The alliance features one firm per area, and its Atlanta representative is 18-lawyer Schulten Ward Turner & Weiss (<https://www.swtlaw.com/>).

The moderator, Atlanta law firm consultant John Remsen Jr. (<http://www.theremsengroup.com/>), teed up the discussion with observations about the difficulty of managing law firms. He was armed with many statistics, some pointing to paradoxical thinking by law firm leaders.

One study, he said, showed that leaders’ top concern is retaining young lawyers, but another study showed that leaders’ top priority was increasing productivity.

Other studies showed a majority of firms not performing client satisfaction surveys or employee satisfaction surveys, Remsen noted.

He reserved particular criticism for “too much democracy in many firms,” where, “all it takes is one senior partner to stop an initiative.”

“It’s not a leader’s job to make everyone happy,” Remsen asserted.

One lawyer in the audience pointed out an issue that seemed to resonate—the loss of associates who have been with their firms since law school. One departing associate reportedly said of big firms, “They just like to pick them off from midsize firms.”

Remsen acknowledged the problem and said work-life balance and other aspects of midsize practices can entice some lawyers to stay. “Those people are out there,” he said, adding that exit interviews can glean a lot of helpful information.

Remsen then turned to the panelists, Bill Acevedo of Oakland’s Wendel Rosen (<https://www.wendel.com/>) (67 lawyers); John Monroe of Cleveland’s Mansour Gavin (<https://mansourgavin.com/>) (23 lawyers) and David Taub (<https://www.robinsappleby.com/home>) of Toronto’s Robins Appleby (28 lawyers.)

Acevedo, who handles transactional, regulatory, litigation and green business issues, said his 110-year-old firm “is at an inflection point.”

He recalled a meeting in which partners were asked how long they expected to practice before retirement. “The numbers were startling,” he said—that is, too many were in the twilight of their careers—and a strategic planning committee was formed.

Acevedo said he was dubious, but the results have proven him wrong. One aspect involved interviews with 30 firm clients, done by two lawyers each, neither of which was the client’s relationship partner. Good news came from these, he said: “Our clients really, really liked us.”

Acevedo said a firm retreat was helpful too, noting sessions led by associates “brought a lot of thoughtful insights.”

Support staff at the firm, he said, took surveys and were looking to the partners to assure them that they were ready for the retirements. “They wanted to know we had a plan,” he said.

Changes included shortening the firm name and overhauling its logo to one that looked better on social media, he said.

Mansour Gavin’s Monroe, who works on real estate and land use issues, said his partners worked on succession issues, given six of its 23 lawyers are over 68 years old.

It also worked on increasing revenue diversity after deciding billings from two clients took up a larger share than they were comfortable with.

One method they chose was to break the firms into accountability groups, in which four lawyers meet every quarter to compare notes on how much of their individual business plans they accomplished.

Showing that firms need a balance between business development and productivity, Taub, a business litigator at Robins Appleby, recalled that his firm at one point had too many lawyers wanting to go market their services and not enough wanting to do the billable work.

More broadly, he said, as the firm faced succession issues, partners had to figure out “who we are and who do we want to be,” he said.

“Nothing changes unless you step back and get a plan,” he added.