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## **Case Study:    Assuming a leadership position**

Jack, an attorney with a small family-owned law firm, hired me to help him make a lateral move to another small firm. We worked together for about three months while he located, interviewed for, and accepted a new position. Following his move, Jack was the only lawyer in his substantive area of practice and was asked to develop that practice further for the firm. To do so, he worked to improve his time management skills, his business development skills, and his practice management skills.

Within 10 months of the time he accepted the new position, Jack felt that he was contributing more to the firm than appropriate for a non-partner. The attorney who had founded the firm ("Terri") had launched a hobby/business that demanded substantial time out of the office. Jack was often uncertain when he would find Terri in the office so he could ask necessary questions and responding to clients whose calls Terri had failed to return. Jack took on substantial client contact roles because he was unsure where Terri was or what she was doing, and he stepped up to fill the gap.

Jack proposed certain improvements for the firm (billing software, for example) but was told that the practice lacked the funds necessary; he became frustrated because he perceived that the firm did have sufficient money for those improvements but that the money was being spent on Terri's hobby/business instead. Finally, Jack was frustrated that he put in a great deal of effort for client development activities and brought in many new matters but received no extra compensation.

Jack and I worked to create a clear and dispassionate description of what was and was not working from his perspective. After determining what he considered a fair resolution of the problems, Jack and I prepared for the conversation that he would have with Terri, raising and negotiating potentially difficult points. When Jack requested and then had a series of conversations with Terri, I served to help him prepare and debrief. Jack concluded that he did not want to become Terri's partner (one resolution offered for an indefinite point in the future) but was able to negotiate an acceptable compensation package and to convince Terri that certain expenditures would benefit the firm by increasing productivity and client service.

Jack is still working for Terri now, but he's laid a timetable to make a move and is developing the contacts that he believes will support him in moving to another firm or opening his own practice. He's also learning more about the business of operating a law office and is implementing an aggressive business development plan. Although he's uncertain when he will move to a new firm or start his own practice, Jack is now comfortable in broaching difficult topics with Terri and is skilled in finding a workable solution to the variety of challenges that he faces.