



## **MPF FEATURED RESOURCE**

**Presentation Handouts and Results from Audience Polling Technology**

## **BRINGING SUSTAINED EXCELLENCE INTO THE BUSINESS OF LAW**

**John Remsen, Jr.**

President, TheRemsenGroup

### **ALA's 2014 Annual Conference & Exposition**

Toronto, Ontario, Canada

May 20, 2014 ♦ 10:15am – 11:45am ET

**TheRemsenGroup**

727 Kirkwood Avenue - Atlanta, GA - 30316  
404.885.9100 - [www.TheRemsenGroup.com](http://www.TheRemsenGroup.com)



## BIOGRAPHICAL PROFILE

### **John Remsen, Jr.**

President & CEO

The Managing Partner Forum

404.885.9100 - [jremsen@managingpartnerforum.org](mailto:jremsen@managingpartnerforum.org)

John Remsen, Jr. is widely recognized as one of the country's leading authorities on law firm leadership, management, marketing and business development. After serving as in-house marketing director at two major law firms, John formed TheRemsenGroup, a consulting firm that works exclusively with law firms to help them develop and implement long-term strategic objectives to improve cohesiveness, performance and profitability. Since 1997, he has worked with over 260 law firms and thousands of lawyers. Most of his clients are mid-size commercial law firms, ranging in size from 15 to 200 lawyers.

John is a frequent speaker and author on law firm leadership and marketing topics. He has spoken at national and regional conferences of the Legal Marketing Association, the Association of Legal Administrators, American Bar Association and numerous state and local bar associations. His articles have appeared in such well-respected publications as *ABA Journal*, *Asian Lawyer*, *Florida Bar News*, *For the Defense*, *Law Practice Management*, *Law Practice Today*, *Lawyers Weekly*, *Legal Management*, *Marketing for Lawyers*, *Marketing the Law Firm*, *Managing Partner*, *New York Law Journal*, *Rainmaker's Review* and *Wisconsin Lawyer*.

In the late 1990's, John served on the national Board of Directors of the Legal Marketing Association (LMA) and was President of its Southeastern chapter for three years. Under his leadership, the chapter was recognized as LMA's Chapter of the Year in 2001. In addition, he was Executive Editor of *Strategies*, LMA's monthly newsletter. He also served on The Florida Bar's Standing Committee on Advertising for six years and was the only non-lawyer appointed to serve on its 2004 Advertising Task Force.

In 2001, TheRemsenGroup launched The Managing Partner Forum, the nation's richest source of information and the most highly acclaimed conference series for leaders of mid-size law firms. More than 825 managing partners from 700 law firms in 41 states have participated in 22 leadership conferences. Designed exclusively for law firm managing partners, the MPF has expanded from its original geographic base in Florida to present programs in Atlanta, Boston, Chicago, Dallas, Denver, Houston, Philadelphia, St. Louis and San Diego.

In 2007, John was appointed to serve as a core member of the ABA's Law Practice Management Section. In 2008, he was appointed to serve on the ABA's Education Board. Since then, he has contributed numerous articles to various ABA publications and has been a featured speaker at ABA meetings and conferences throughout the country.

In 2013, John was elected as a Fellow of the prestigious College of Law Practice Management in recognition of his twenty five years of demonstrated expertise in law firm leadership and management. Founded in 1994, the College honors those who "inspire excellence and innovation in law practice management." Membership is by invitation only and includes just 200 individuals.

A native of West Palm Beach, Florida, John holds an MBA degree from The University of Virginia (1985) and a Bachelor's degree in Business Administration from the University of Florida (1980). Prior to attending graduate school, John was Executive Director of The Florida Council of 100, an organization consisting of Florida's top CEOs and business leaders.

June 2013



**Bringing Sustained Excellence into  
THE BUSINESS OF LAW**

John Remsen, Jr.  
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**JOHN REMSEN, JR.**

- President, TheRemsenGroup  
President & CEO, Managing Partner Forum
- Previous:  
Gunster, Porter Wright
- More than 280 law firms since 1997
- Speaker:  
American Bar Association, Association of Legal Administrators,  
Legal Marketing Association, MPF Annual Conference
- Education:  
MBA – University of Virginia  
BSBA – University of Florida



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**AUDIENCE  
PARTICIPATION TECHNOLOGY**

- Instantaneous
- Anonymous
- Great benchmarking data
- Results will be distributed after the conference



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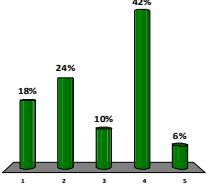
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**TEST QUESTION:**  
Which Movie Title Best Describes How Your Firm's Owners Are Responding to the Changes in the Marketplace for Legal Services?

1. A Perfect World
2. Grumpy Old Men
3. Lost in Space
4. The Hangover: Part 2
5. Gone with the Wind



Movie Title	Percentage
1. A Perfect World	18%
2. Grumpy Old Men	24%
3. Lost in Space	10%
4. The Hangover: Part 2	42%
5. Gone with the Wind	6%



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**How Many Lawyers at Your Law Firm?**

1. < 20 lawyers
2. 20 – 50 lawyers
3. 51- 100 lawyers
4. 101 – 250 lawyers
5. > 250 lawyers



Lawyer Count	Percentage
1. < 20 lawyers	27%
2. 20 – 50 lawyers	14%
3. 51- 100 lawyers	22%
4. 101 – 250 lawyers	17%
5. > 250 lawyers	20%



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### LONG-TERM TRENDS

- The Economy Is Globalizing
- Technology Is Expanding/Improving at Breakneck Speed
- Clients Are More Demanding
- Competition Is Much More Aggressive
- BigLaw Is Getting Bigger
- Disruptors Will Continue to Proliferate
- Record Level of "Merger & Acquisition" Activity
- Successful Law Firms Must Be Run More Like Businesses



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### ROGERS ADOPTION / INNOVATION CURVE

Category	Percentage
Innovators	2.5 %
Early Adopters	13.5 %
Early Majority	34 %
Late Majority	34 %
Laggards	16 %



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### Where Do You Believe that Most Lawyers Are on the Adoption Curve?

1. Innovators
2. Early Adopters
3. Early Majority
4. Late Majority
5. Laggards

Category	Percentage
1. Innovators	0%
2. Early Adopters	1%
3. Early Majority	10%
4. Late Majority	56%
5. Laggards	33%



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**Lawyer Personalities**

- Highly skeptical
- Hate change
- Risk averse
- Love autonomy
- Low resilience
- High sense of urgency

Source: Dr. Larry Richard – LawyerBrain, LLC

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**IT'S TIME TO  
WAKE UP & SMELL THE COFFEE**

*The greatest obstacle to success in the new economy isn't competition, client price pressure, technology, commoditization, or globalization.*

*It's our own reluctance to embrace proven business principles because we are deluded into thinking that law cannot be both a profession and a business.*



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**THE BUSINESS OF LAW**

- Finance and Accounting
- Information Technology
- Marketing and Business Development
- Human Resources
- Leadership and Governance
- Strategic Planning and Implementation
- Firm Owners Who Get It



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**LONG-TERM INVESTMENT**

- Clients
- People
- Firm



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**KEYS TO SUCCESSFUL CHANGE**

- Be Flexible. Take It Where You Can Get It
- Focus on Just Three Things
- Achieve Genuine Buy-in and Support from Leadership
- Monitor and Establish Accountability
- Measure and Reward Desired Outcomes
- Start with Pilot Projects
- Trumpet Success Far and Wide
- Know that Mistakes are Deal-Killers



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**Vision Among Owners**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

Firm Size, including Succession

Practice Mix

Client Mix

Geographic Footprint



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**Vision Among Owners**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

Firm Size, including Succession  
 Practice Mix  
 Client Mix  
 Geographic Footprint

1. One
2. Two
3. Three
4. Four
5. Five
6. Six
7. Seven
8. Eight
9. Nine
10. Ten

Grade	Percentage
1	4%
2	3%
3	3%
4	14%
5	23%
6	14%
7	14%
8	14%
9	3%
10	3%

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**Strong, Passionate Leadership**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

Managing Partner / CEO  
 Firm Administrator / COO  
 Departments and practice groups  
 Administrative team  
 Training and development  
 Job descriptions

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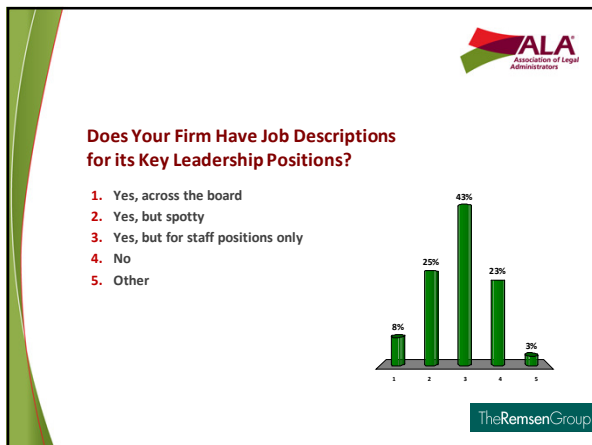
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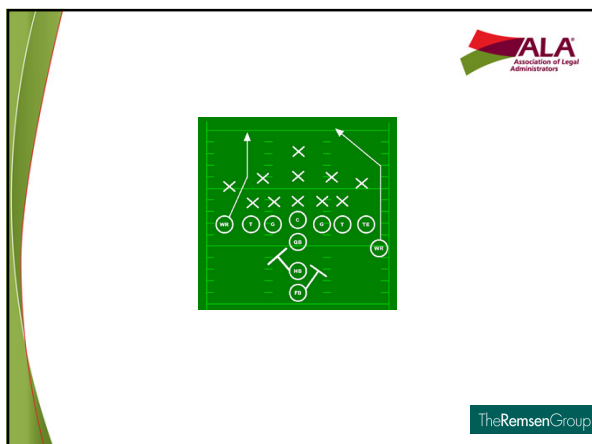
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### Strategic Plan & Implementation

Grade your firm on a 1-10 scale, with 10 as the highest score.

- Keep it simple, stupid.
- Just three major goals
- Monitoring and accountability
- Rewards and recognition




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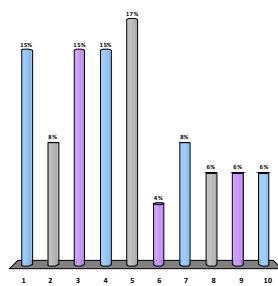
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### Strategic Plan & Implementation


Grade your firm on a 1-10 scale, with 10 as the highest score.

- Keep it simple, stupid.
- Just three major goals
- Monitoring and accountability
- Rewards and recognition



Grade	Percentage
1	15%
2	8%
3	15%
4	15%
5	17%
6	4%
7	8%
8	8%
9	8%
10	8%

- One
- Two
- Three
- Four
- Five
- Six
- Seven
- Eight
- Nine
- Ten




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### Does Your Firm Have a Firm-wide Strategic Plan?

- Yes, recently developed
- Yes, but more than three years ago
- No
- Work in progress
- Not sure



Response	Percentage
1. Yes, recently developed	26%
2. Yes, but more than three years ago	15%
3. No	33%
4. Work in progress	27%
5. Not sure	0%




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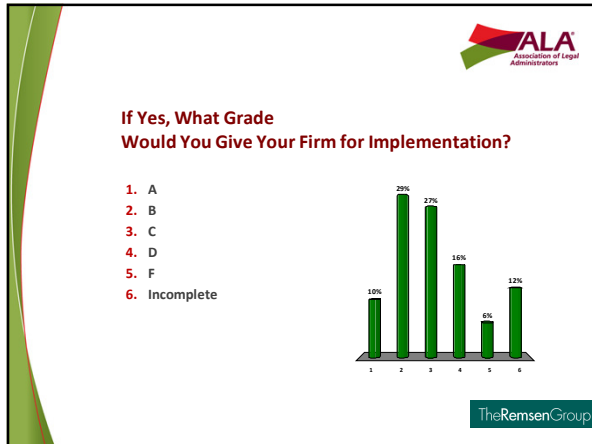
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**Streamlined Decision-Making**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Managing partner / CEO
- Executive committee
- Functional committees and task forces
- Capable of making decisions and moving on
- Trusted and competent administrative team

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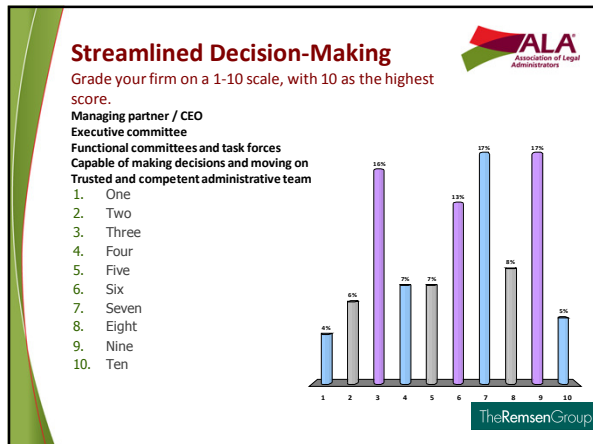
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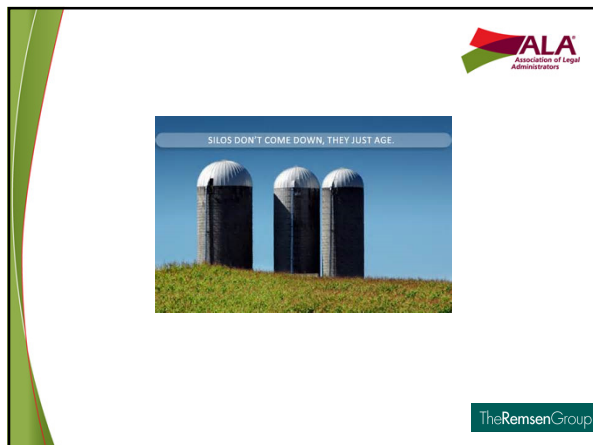
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### Internal Communication

Grade your firm on a 1-10 scale, with 10 as the highest score.

**ALA**  
Association of Legal Administrators

- Up, down, across and diagonally
- Frequent and broadcast in different ways
- Regularly scheduled, well-run meetings
- Client teams and practice groups
- Firm retreats and social events
- Face-to-face is always best

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**Internal Communication**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

- Up, down, across and diagonally
- Frequent and broadcast in different ways
- Regularly scheduled, well-run meetings
- Client teams and practice groups
- Firm retreats and social events
- Face-to-face is always best

- One
- Two
- Three
- Four
- Five
- Six
- Seven
- Eight
- Nine
- Ten

Grade	Percentage
1	7%
2	5%
3	18%
4	13%
5	15%
6	22%
7	13%
8	11%
9	7%
10	2%

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**Firm-First Culture**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

- Solid Firm citizenship
- Positive, go-the-extra mile attitudes
- Adherence to firm policies and procedures
- Sharing and teamwork
- Departments and sections
- Client teams and industry practice groups
- Leadership by example

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- Positive, go-the-extra mile attitudes
- Adherence to firm policies and procedures
- Sharing and teamwork
- Departments and sections
- Client teams and industry practice groups
- Leadership by example

1. One
2. Two
3. Three
4. Four
5. Five
6. Six
7. Seven
8. Eight
9. Nine
10. Ten

Score	Percentage
1	1%
2	6%
3	18%
4	16%
5	18%
6	37%
7	21%
8	11%
9	4%
10	5%

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**Great Client Service**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

- Genuine care for clients and their success
- Accessibility and responsiveness
- Knowledge of business and industry
- Client site visits
- Client feedback program
- Invite clients into the firm

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 Grade your firm on a 1-10 scale, with 10 as the highest score.

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 Accessibility and responsiveness  
 Knowledge of business and industry  
 Client site visits  
 Client feedback program  
 Invite clients into the firm

- One
- Two
- Three
- Four
- Five
- Six
- Seven
- Eight
- Nine
- Ten

Grade	Percentage
1	1%
2	3%
3	3%
4	2%
5	4%
6	13%
7	24%
8	27%
9	23%
10	4%

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**Does Your Firm Have a Formal, Ongoing Client Feedback Program?**

- Yes
- Hit or Miss
- No
- Other

Response	Percentage
1. Yes	18%
2. Hit or Miss	22%
3. No	61%
4. Other	0%

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**Efficient Billing and Collections**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Time management training
- Billing strategies and techniques
- Aggressive collections practices
- Retainers, late fees and credit cards
- Good clients pay their bills



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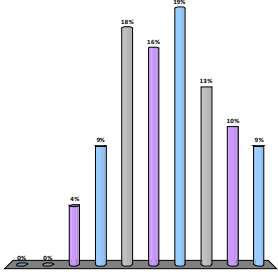
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**Efficient Billing and Collections**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Time management training
- Billing strategies and techniques
- Aggressive collections practices
- Retainers, late fees and credit cards
- Good clients pay their bills

1. One  
2. Two  
3. Three  
4. Four  
5. Five  
6. Six  
7. Seven  
8. Eight  
9. Nine  
10. Ten



Grade	Percentage
1	0%
2	0%
3	4%
4	9%
5	18%
6	16%
7	19%
8	13%
9	10%
10	9%



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**Selective Client Intake**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Firm-wide policies and procedures, including engagement letter
- Intake committee
- Strategic conflicts of interest
- Retainers, late fees and credit cards
- Background and credit checks



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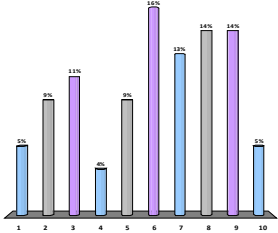
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**Selective Client Intake**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Firm-wide policies and procedures, including engagement letter
- Intake committee
- Strategic conflicts of interest
- Retainers, late fees and credit cards
- Background and credit checks

1. One  
2. Two  
3. Three  
4. Four  
5. Five  
6. Six  
7. Seven  
8. Eight  
9. Nine  
10. Ten



Grade	Percentage
1	3%
2	3%
3	11%
4	4%
5	3%
6	14%
7	13%
8	14%
9	14%
10	3%



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**Associate Training and Development**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Recruiting and retention program
- Mentoring and feedback
- Formal training and development
- Access to clients
- Track to partnership
- Two-tiered partnership structures



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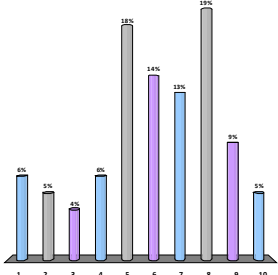
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Grade your firm on a 1-10 scale, with 10 as the highest score.

- Recruiting and retention program
- Mentoring and feedback
- Formal training and development
- Access to clients
- Track to partnership
- Two-tiered partnership structures

- One
- Two
- Three
- Four
- Five
- Six
- Seven
- Eight
- Nine
- Ten



Grade	Percentage
1	6%
2	3%
3	4%
4	6%
5	18%
6	14%
7	13%
8	19%
9	9%
10	5%



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**Marketing & Business Development**  
Grade your firm on a 1-10 scale, with 10 as the highest score.

- Client feedback programs
- Client teams and industry practice groups
- Individual marketing plans
- Social media and search engine optimization
- Marketing staff



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Grade your firm on a 1-10 scale, with 10 as the highest score.

- Client feedback programs
- Client teams and industry practice groups
- Individual marketing plans
- Social media and search engine optimization
- Marketing staff

- One
- Two
- Three
- Four
- Five
- Six
- Seven
- Eight
- Nine
- Ten



Grade	Percentage
1	7%
2	8%
3	11%
4	7%
5	17%
6	8%
7	13%
8	23%
9	4%
10	4%



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**Information Technology**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

- Time and billing practices
- Case management systems
- Shared forms and documents library
- Knowledge and client relationship management
- Laptops, iPads and iPhones
- Cyber security




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**Information Technology**  
 Grade your firm on a 1-10 scale, with 10 as the highest score.

- Time and billing practices
- Case management systems
- Shared forms and documents library
- Knowledge and client relationship management
- Laptops, iPads and iPhones
- Cyber security

1. One
2. Two
3. Three
4. Four
5. Five
6. Six
7. Seven
8. Eight
9. Nine
10. Ten

Grade	Percentage
4	4%
5	8%
6	4%
7	31%
8	15%
9	23%
10	15%




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### Aligned Compensation System

Grade your firm on a 1-10 scale, with 10 as the highest score.

Look beyond the numbers

- One size fits all ?
- Shared (or sunset ) origination credit
- Rewards for non-financial contributions



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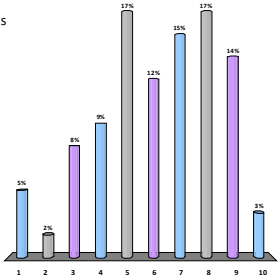
### Aligned Compensation System

Grade your firm on a 1-10 scale, with 10 as the highest score.


Look beyond the numbers

- One size fits all ?
- Shared (or sunset ) origination credit
- Rewards for non-financial contributions

1. One  
2. Two  
3. Three  
4. Four  
5. Five  
6. Six  
7. Seven  
8. Eight  
9. Nine  
10. Ten



Grade	Percentage
1	5%
2	2%
3	8%
4	9%
5	37%
6	12%
7	19%
8	37%
9	14%
10	3%



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### Tackle Difficult Issues

Grade your firm on a 1-10 scale, with 10 as the highest score.

- Chronic under-performance
- Bullying and bad behavior
- Retiring senior partners
- Incompatible practice areas

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### Tackle Difficult Issues

Grade your firm on a 1-10 scale, with 10 as the highest score.

- Chronic under-performance
- Bullying and bad behavior
- Retiring senior partners
- Incompatible practice areas

1. One
2. Two
3. Three
4. Four
5. Five
6. Six
7. Seven
8. Eight
9. Nine
10. Ten

Grade	Percentage
1	10%
2	3%
3	13%
4	7%
5	21%
6	13%
7	12%
8	12%
9	5%
10	2%

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### Does Your Firm Have a Two-Tiered Partnership Structure?

1. Yes
2. Moving in that direction
3. No
4. Other

Response	Percentage
1. Yes	63%
2. Moving in that direction	9%
3. No	28%
4. Other	0%

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**KEYS TO SUCCESSFUL CHANGE**

- Be Flexible. Take It Where You Can Get It
- Focus on Just Three Things
- Achieve Genuine Buy-in and Support from Leadership
- Monitor and Establish Accountability
- Measure and Reward Desired Outcomes
- Start with Pilot Projects
- Trumpet Success Far and Wide
- Know that Mistakes are Deal-Killers



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**TIPS FOR FIRM ADMINISTRATORS**

- Be a catalyst for change
- Do your homework
- Ask smart questions
- Show precedent
- Use facts and statistics
- Circulate articles and white papers
- Pick you battles very carefully



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**ADDITIONAL RESOURCES**

- [ManagingPartnerForum.org](http://ManagingPartnerForum.org)
- [AmericanBar.org](http://AmericanBar.org)
- [DavidMaister.com](http://DavidMaister.com)
- [CorcoranLawBizBlog.com](http://CorcoranLawBizBlog.com)
- [LawyerBrainBlog.com](http://LawyerBrainBlog.com) (Larry Richard)
- [LegalMarketing.org](http://LegalMarketing.org) (LMA)



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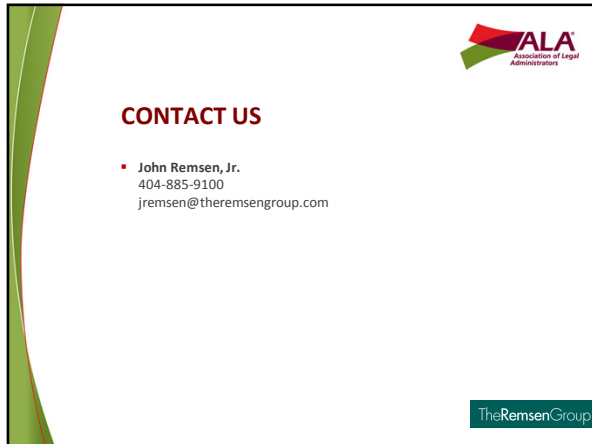
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**CONTACT US**

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Association of Legal Administrators



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***Your opinion matters!***

Please take a moment now  
to evaluate this session.

*Thank You!*

*Your connection*  
to knowledge, resources and networking

  
Association of Legal Administrators

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