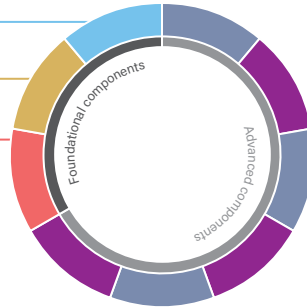


Attorney Relationship Management System

Goal: A better relationship with attorneys resulting in improved performance and reduced turnover

3 FOUNDATIONAL COMPONENTS:

Cultural Assessment
Consideration of Economic Factors and Profitability
Assessment of Performance Evaluation Systems



6 ADVANCED COMPONENTS:

Practice Planning Process
Expanded Compensation & Incentive Plans
Training & Development Solutions
Recruiting & Hiring Processes
The Employee Experience
Work/Life Blend

Foundational Components



Cultural Assessment

Goal:

Everyone should understand the culture of the firm today & the plan is for making it better.



Consideration of Economic Factors and Profitability

Goal:

Everyone should understand the drivers of profitability & have the ability to improve their results.



Assessment of Performance Evaluation Systems

Goal:

Everyone should understand how they are doing & have the information they need to progress.

Objectives

Objective:

Ensuring that the firm's culture is a benefit to the recruiting and retention process.



Evaluating the factors that affect profitability and address any inconsistencies in pay and performance that could lead to turnover.



To ensure that the firm has the necessary evaluation tools and processes to reduce the likelihood of losing successful lawyers because of inadequate performance measurement systems.



Process Steps

- 1 Recruiting & retention approach
- 2 Communication & feedback
- 3 Comprehension of the firm's core values, mission, and vision
- 4 The employee experience
- 5 New employee orientation, onboarding, & integration processes
- 6 Attorney development
- 7 Performance management
- 8 Transition planning & long term outlook
- 9 Compensation & incentives
- 10 Non-monetary and traditional employee benefits

Process Steps

- 1 Evaluating historical timekeeper profitability
- 2 Comparative compensation analysis by demographic*
- 3 Comparative profitability analysis by demographic**

*bar date, tenure, job title

** bar date, tenure, job title, supervising partner, and client quality

Deliverables:

- Detailed **timekeeper** profitability analysis
- Comparative **compensation** analysis by demographic
- Comparison of **profitability** and turnover
- Action plans for **improving profitability**

Process Steps

- 1 Create/revise model criteria
- 2 Review the existing evaluation process, forms, reports, & communication methods
- 3 Complete summary evaluations using model criteria of all attorneys
- 4 Retroactively rate attorneys who left the firm in the prior five years
- 5 Analyze evaluation results (individual & demographic trends)

Deliverables:

- An improved **performance** evaluation system
- Individual attorney **assessments** using model criteria - ahead of or behind expectations
- Insights regarding **attorney** turnover
- Updated model **associate criteria**

Deliverables:

Identification of cultural **strengths & weaknesses**

Recommended **improvement steps**

Advanced Components



Practice Planning Process

Goals Everyone should appreciate the firm is committed to fair processes and availability of opportunities

Objectives Improved attorney performance, a fair career development process, and reduced turnover of good fit attorneys.

Process Steps

- 1 Select approach: Structured using demographic criteria or bespoke based on individual attorney roles.
- 2 Develop hourly guidelines (client work & non billable): Consult the firm's economic model, budget, client needs, and model attorney criteria.
- 3 Define individual goals and expectations
- 4 Prepare each plan using suggested activities by demographic or individually defined activities
- 5 Individual attorney meetings and feedback schedule
- 6 Macro capacity (total firm) plan informed by individual plans

Deliverables: ☒ ☒ ☒

Written **practice plan** for each attorney and follow up schedule

Alignment between **attorney & firm** goals

More informed **budgeting & forecasting** processes



Expanded Compensation & Incentive Plans

Everyone should understand who is getting ahead and why.

A compensation structure that promotes long term success and establishes a clear connection between behavior & compensation.

Process Steps

- Definition of compensable factors (objective and subjective)
- Schedule of salary evaluations & bonus payments
- Process for setting and adjusting base salaries
- Process for calculating objective and subjective bonuses
- Guidelines and policies regarding any objective formulas.
- Explanation of any applicable alternative compensation plans
- Creation of support tools

Deliverables: ☒ ☒ ☒

Written compensation **policies, guidelines, and structure**

Support tools to ensure that **the plan** is administered properly

Pay adjustment and **bonus pay** schedule



Training & Development Solutions

Enabling lawyers to reach their full potential faster

The training and development program should result in increased profitability, reduced turnover, and better client service.

Process Steps

- Create the training program scope (legal skills, practice skills, client service, marketing, etc.)
- Select training approach (online, written, personal instruction, in-house custom, external, etc.)
- Create training budget
- Create group and individual training plans
- Create compensation plan for training contributions

Deliverables: ☒ ☒ ☒ ☒

Program strategy, **goals & expectations**

Training plans, **budget, & delivery method**

Attorney and **group training** plans

Rewards system for **attorneys who** provide training



Recruiting & Hiring Processes

Attracting and retaining best fit lawyers whose association with the firm transcends money

To identify, attract and successfully hire the best fit attorneys.

Process Steps

- Create a recruiting strategy (prospective, need based, targeted)
- Create/revise hiring criteria - new law school graduates
- Create/revise hiring criteria - lateral hires
- Document hiring processes including policies & procedures
- Create interviewing rules and process tools
- Consider incentives and rewards for recruiting contributions
- Policy regarding outside recruiters
- Create a hiring plan and budget

Deliverables: ☒ ☒ ☒ ☒ ☒

Strategic **recruiting plan**

Comprehensive **hiring criteria** criteria

Documented **interviewing & hiring** processes

Written recruiting **interviewing & incentive** plan (if adopted)

Annual **hiring plan & budget**



The Employee Experience

Creating a natural inclination toward collaboration and service

To ensure that firm life is a positive and nurturing experience.

Process Steps

- Definition and feasibility of important firm life factors
- Score the firm's performance in key firm life areas
- Solicit input from all attorneys and staff
- Identification of improvement areas
- Exit interviews (where possible) for all people who have left the firm in the last 3 years

Deliverables: ☒ ☒ ☒ ☒

Firm life **improvement plan**

Ongoing **feedback system**

Exit interviewing **policy & system** plans

Communication **protocol** - informal & structured



Work/life Blend

Everyone should appreciate the firm is concerned for their total well-being

To create a nurturing environment that goes beyond the typical work for pay approach.

Process Steps

- Survey the attorneys to solicit input on the most useful services
- Define the scope of the program, rules, guidelines, and services offered
- Development of self-help tools & resources guide
- Evaluate and select a network of potential professional resources to assist with providing services
- Evaluate the costs of the program & services provided

Deliverables: ☒ ☒ ☒

Written personal **development & career counseling** services brochure and usage guide

Published **self-help & resource** options

Financial support document outlining the firm's **financial commitment** to the program & costs to participants as applicable