# MANAGING PARTNER ENGAGEMENT WORKSHEET

Define the role. Measure the contribution. Strengthen firm leadership.

## WHY THIS WORKSHEET MATTERS

Managing partners balance firm leadership with client service, business development, and legal work. This worksheet makes management responsibilities visible, estimates the time required, and helps distinguish between work to own, share, or delegate.

# MANAGING PARTNER ENGAGEMENT WORKSHEET

| Area | Estimated Common Benefit Hours | | | Engagement Level | | | |
|---|---|---|---|---|---|---|---|
| **Accounting and Taxes** | **Weekly** | **Monthly** | **Annually** | **Oversight** | **Hands On** | **Shared** | **NA** |
| Review financial statements | | | | | | | |
| Review general ledger | | | | | | | |
| Interface with firm's CPA | | | | | | | |
| Manage firm tax matters | | | | | | | |
| Interface with key software vendors | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| **Finance and Banking** | | | | | | | |
| Review cash reports | | | | | | | |
| Approve credit line draws and paydowns | | | | | | | |
| Billings and collections | | | | | | | |
| Manage banking relationships | | | | | | | |
| Approve cash disbursements and transfers | | | | | | | |
| Negotiate credit lines | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| **Marketing** | | | | | | | |
| Create firm marketing plan | | | | | | | |
| Manage individual marketing planning process | | | | | | | |
| Marketing systems development (CRM & Automation) | | | | | | | |
| Marketing expense approval | | | | | | | |
| Marketing policy development | | | | | | | |
| Website and digital marketing (blogs, newsletters, video, etc.) | | | | | | | |
| Manage key outsourced marketing relationships | | | | | | | |
| Firm functions and events | | | | | | | |
| Internal meetings and reporting | | | | | | | |
| Public relations | | | | | | | |
| Review KPIs and institute corrective action | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| | | | | | | | |
| **Human Resources** | | | | | | | |
| Salary administration - professional and staff | | | | | | | |
| Benefit administration(health, life, disability, 401K, etc.) | | | | | | | |

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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| Staff review process | | | | | | | |
| Hires, terms and counselling | | | | | | | |
| Partner conflicts | | | | | | | |
| Policy and procedure enforcement | | | | | | | |
| Policy manual | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| **Technology** | | | | | | | |
| Software applications | | | | | | | |
| Network infrastructure | | | | | | | |
| Desktop and mobile appliances | | | | | | | |
| System access management | | | | | | | |
| Data and network security and backup | | | | | | | |
| In-house resource management | | | | | | | |
| Outsourced resource management | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |

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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| **Facilities and Office Services** | | | | | | | |
| Office and seating assignments | | | | | | | |
| Leasehold management and landlord relationships | | | | | | | |
| Records management | | | | | | | |
| Disaster planning | | | | | | | |
| Office ergonomics and environmental factors | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| | | | | | | | |
| **Major Purchase Management** | | | | | | | |
| Furniture and equipment | | | | | | | |
| Information Technology | | | | | | | |
| Outsourcing agreements | | | | | | | |
| Contracts, Leases, and purchase agreements | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| **Attorney Performance** | | | | | | | |
| Practice planning process | | | | | | | |
| Training programs and CLE administration | | | | | | | |
| Non performance issues | | | | | | | |
| Workload distribution | | | | | | | |
| Review KPIs and institute corrective action | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| | | | | | | | |
| **Partner Issues** | | | | | | | |
| Partner performance issues | | | | | | | |
| Partner relationship issues | | | | | | | |
| Partner and staff relationship management | | | | | | | |
| Partner policy and procedure enforcement | | | | | | | |
| Origination management | | | | | | | |
| Other (specify) | | | | | | | |
| Sub-total | 0 | 0 | 0 | | | | |
| | | | | | | | |

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|---|---|---|---|---|---|---|---|
| **Legal Compliance and Risk Management** | **Weekly** | **Monthly** | **Annually** | **Oversight** | **Hands On** | **Shared** | **NA** |
| Insurance coverages (CGL, Cyber, E&O, EPL, FIduciary, ERISA Etc.) | | | | | | | |
| Licensing and permitting | | | | | | | |
| Retention letters | | | | | | | |
| Contingent liabilities | | | | | | | |
| Contingent fee agreements | | | | | | | |
| Debt exposure firm and partner levels | | | | | | | |
| Conflicts of interest | | | | | | | |
| Risk management policies and procedures | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| **Client Service** | | | | | | | |
| Review KPIs and institute corrective action | | | | | | | |
| Client satisfaction tools and measurement | | | | | | | |
| Dispute resolution | | | | | | | |
| Client service training and education | | | | | | | |
| Regular client service meetings | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |

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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| **Cost Control and Profitability** | | | | | | | |
| Review KPIs and institute corrective action | | | | | | | |
| Cost control policies and enforcement | | | | | | | |
| Setting profit targets | | | | | | | |
| Billing rate and realization management | | | | | | | |
| Write off management | | | | | | | |
| Alternative fee agreements | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| | | | | | | | |
| **Partners Compensation** | | | | | | | |
| Process management(data collection, formula preparation, input) | | | | | | | |
| Partner pay and incentives (if an MP duty) | | | | | | | |
| Partner pay recommendations (if an MP duty) | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
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|---|---|---|---|---|---|---|---|
| **Lateral Hiring and Recruiting** | **Weekly** | **Monthly** | **Annually** | **Oversight** | **Hands On** | **Shared** | **NA** |
| Lateral vetting and process management | | | | | | | |
| Lateral economic analysis | | | | | | | |
| Lateral offers and agreements | | | | | | | |
| Recruiting policy and process | | | | | | | |
| Recruiting events | | | | | | | |
| Recruiter relationships | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| **Strategic Planning** | | | | | | | |
| Plan development | | | | | | | |
| Process management | | | | | | | |
| Consultants | | | | | | | |
| Retreat planning and preparation | | | | | | | |
| Plan execution | | | | | | | |
| Transition planning (if applicable) | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |

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|---|---|---|---|---|---|---|---|
| | Weekly | Monthly | Annually | Oversight | Hands On | Shared | NA |
| **Branch Office Management and Development** | | | | | | | |
| Branch office management and administration | | | | | | | |
| New branch office development | | | | | | | |
| Branch office visits | | | | | | | |
| Other (specify) | | | | | | | |
| **Sub-total** | 0 | 0 | 0 | | | | |
| | | | | | | | |
| **TOTAL** | 0 | 0 | 0 | | | | |
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# READY TO STRENGTHEN YOUR FIRM'S MANAGEMENT STRUCTURE?

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