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*Creating Great Practice Groups*



**Workbook  
Excerpts**

### **Sample Practice Group Leader Job Description**

The critical role of the Practice Group Leader is to provide active and rigorous leadership of the group, helping it to achieve a higher level of competitiveness and market position/presence. The leader is expected to spend most of his or her time on “leadership activities” and, to the degree possible, delegate other important administrative/management activities to others in the group or professional managers. The Practice Group Leader is expected to spend 200-500 hours annually on Group leadership/management functions, depending upon the size of the Group. Specific responsibilities will include:

1. Group Plan: The Practice Group Leader shall ensure that an annual strategic plan is developed (revised) and that all Group members participate in the planning and execution efforts. The Practice Group Leader shall present the plan to the Management Committee for discussion/approval.
2. Individual Lawyer Plans: The Practice Group Leader shall ensure that each lawyer develops an annual business plan, monitor the lawyer’s implementation efforts throughout the year and assist in changing/revising the plan as circumstances dictate.
3. Profitability: The Practice Group Leader shall measure, evaluate and report for the Group on profitability issues throughout the year. The strategic plan shall set forth strategies to increase profitability.
4. Marketing and Practice Development: Practice Group Leaders shall ensure that strategic initiatives developed to expand the Group’s practice are rigorously implemented.
5. Inter-Department Coordination: Practice Group Leaders shall be the focal point for collaboration, coordination and communications among other Groups.

# Being a Highly-Effective Practice Group Leader

## *Creating Great Practice Groups, Part One*

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6. Work Product and Service Quality Control: Practice Group Leaders are responsible for ensuring that quality control policies and systems are established and complied with.
7. Lawyer Development: Practice Group Leaders are responsible for ensuring the establishment of training and education programs, germane to the Group, for partners and associates.
8. Administrative Policies: Practice Group Leaders shall have oversight responsibility for ensuring that Group members comply with established Firm administrative policies such as opening new matters, timekeeping, write-offs, billing and bill follow up, evaluating associates and the like. The Practice Leader shall employ lawyer and administrative resources needed to maintain effective 'administrationship' of the Group.

### **Practice Management Professional Roles and Responsibilities**

The Practice Management Professional shall work under and at the direction of department chairs. Although the PMP will report directly to departmental chairs, he or she will work closely with Practice Group Leaders providing administrative, operational and strategic assistance. Specific duties will include:

1. Assistance in development of the departments and/or practice group strategic business plans. Monitoring implementation as necessary. Suggest modifications/ revisions.
2. Administration of delegated functions such as assuring appropriate client acceptance procedures and policies, timekeeping, billing and collection, and other administrative reporting as required. The PMP will work closely with the firm's Executive Director and financial administrators in this support function.
3. Financial and strategic analysis of the department and/or practice group profitability as well as client and matter profitability. PMP will recommend areas for improvement where indicated.
4. The PMP may work with departmental Chairmen and well as Practice Group Leaders on workload management, including involvement with intake and assignment of lawyers and other professionals, as determined by the Chair and Practice Group Leaders.
5. Interviewing and evaluation of possible lateral acquisition candidates, including due diligence and other functions as set forth by the Chairperson and/or recruiting partners.
6. Involvement in implementation of marketing and business development activities as directed by the Chairman, Practice Group Leaders and possibly the firm's Chief Marketing Officer.
7. Special projects as requested by the Chairperson.

## Being a Highly-Effective Practice Group Leader

### *Creating Great Practice Groups, Part One*

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Many of the PMPs' functions will entail "working with many bosses." It is incumbent upon the Chairman and the PMP to ensure that he or she is not overburdened in this respect and that priorities are clearly established.

## Sample Practice Group Leader Performance Evaluation Form

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**Practice Group Leader:** \_\_\_\_\_

**Evaluator:** \_\_\_\_\_

**Date of Evaluation:** \_\_\_\_\_

Following are factors that contribute to a practice group leader's effectiveness. Indicate which response rating best describes the practice group leader's performance for each factor, using the following rating scale.

**Rating Scale:**

| Score | Rating                            | Detailed Explanation  |
|-------|-----------------------------------|---|
| 5     | Consistently exceeds expectations | Indicates superior performance that consistently exceeds expectations for the position given the individual's experience. This individual performs well beyond the requirements of the position and is truly exceptional. If this rating is given, there should be written support with specific comments and examples.   |
| 4     | Often exceeds expectations        | Indicates performance of high quality, which often exceeds expectations for the position given the individual's experience. This individual often performs beyond the requirements of the position. If this rating is given, there should be written support with specific comments and examples.   |
| 3     | Meets expectations                | Indicates performance that consistently meets the requirements of the position given the individual's experience. This rating is used to describe performance that meets the high standards of the firm.  |
| 2     | Sometimes meets expectations      | Indicates performance that requires additional effort to improve over time. If this rating is given, it should be supported with specific examples and comments on how performance is to be improved. It is imperative that agreement is reached on a definite plan of action to rapidly bring up the individual's performance.   |
| 1     | Immediate improvement necessary   | Indicates performance that requires improvement for the practice group leader to meet expectations for the position given the individual's experience. Performance with this rating is below that which is normally expected of a lawyer with this individual's level of experience in this position. If this rating is given, it should be supported with specific examples and comments on how performance is to be improved. It is imperative that agreement is reached on a definite plan of action to rapidly bring up the leader's performance. |
| NB    | No basis                          | Used when the evaluator is unable to form an opinion on the leader's performance on this factor either because the factor does not apply or because of other special circumstances.   |

**Factors:**

| Factor                        | Areas  | Current Year Rating | Prior Year's Rating |  |
|-------------------------------|--|---------------------|---------------------|--|
| <b>Group Plan</b>             | 1. Timeliness of plan development  |                     |                     |  |
|                               | 2. Thoroughness of the plan  |                     |                     |  |
|                               | 3. Including group members in development  |                     |                     |  |
|                               | 4. Communicating the plan to others  |                     |                     |  |
|                               | 5. Collaboration with other group leaders  |                     |                     |  |
|                               | 6. Delegation of planning tasks  |                     |                     |  |
|                               | 7. Appropriate use of firm resources   |                     |                     |  |
|                               | 8. Quality of communication to group members   |                     |                     |  |
|                               | <b>Total Group Plan Rating</b>   |                     |                     |  |
| <b>Individual Lawyer Plan</b> | 1. Timeliness of plans   |                     |                     |  |
|                               | 2. Thoroughness of plan  |                     |                     |  |
|                               | 3. Coaching of group members   |                     |                     |  |
|                               | 4. Cross-pollination among group members   |                     |                     |  |
|                               | 5. Staying in touch with group members   |                     |                     |  |
|                               | <b>Total Individual Lawyer Plan Rating</b>   |                     |                     |  |
| <b>Objectives Achieved</b>    | 1. Achieving plan objectives, overall  |                     |                     |  |
|                               | 2. Revising during implementation year   |                     |                     |  |
|                               | <b>Total Objectives Achieved Rating</b>  |                     |                     |  |
| <b>Leadership</b>             | 1. <u>Leadership skills</u><br>a. Enhances the success of others<br>b. Communications<br>c. Fosters desire for others to follow his/her lead<br>d. Supports quality efforts<br>e. Contributes to administrative tasks<br>f. Sets/Achieves professional development goals<br>g. Educates constantly |                     |                     |  |
|                               | 2. <u>Personal management</u><br>a. Effectively utilizes time<br>b. Delegates appropriately<br>c. Meets deadlines<br>d. Organized  |                     |                     |  |
|                               | <b>Total Leadership Rating</b>   |                     |                     |  |

**Total Rating:**

| <b>Factor</b>   | <b>Total Current Year Rating</b> | <b>Total Prior Year's Rating</b> |
|---|----------------------------------|----------------------------------|
| Group Plan  |                                  |                                  |
| Individual Lawyer Plan  |                                  |                                  |
| Objectives Achieved   |                                  |                                  |
| Leadership  |                                  |                                  |
| <b>Total Rating Score</b>   |                                  |                                  |
| <b>Average Score</b><br><i>(total rating ÷ number of ratings)</i> |                                  |                                  |





**Performance Goals:**

- 1. List the performance goals for this practice group leader.

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**Training and Development:**

- 1. List the training and development needs for this practice group leader.

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## **ALTMAN WEIL PRACTICE GROUP PERFORMANCE SCORECARD**

| <b>FACTOR</b>                        | <b>SCORE</b> | <b>RATING SCALE</b>      |
|--------------------------------------|--------------|--------------------------|
| Overall Practice Group performance   | 49%          | % Very Good or Excellent |
| Overall PG Leader performance        | 52%          | % Very good or Excellent |
| New business generation              | 42%          | % Very Good or Excellent |
| Cross-selling                        | 41%          | % Very Good or Excellent |
| Integrating new lateral hires        | 62%          | % Very Good or Excellent |
| Planning process                     | 6.0          | On a 0-10 rating scale   |
| Plan implementation                  | 5.6          | On a 0-10 rating scale   |
| Effectiveness of non-lawyer PG staff | 7.7          | On a 0-10 rating scale   |

Scorecard ratings are drawn from the *Altman Weil Practice Group Performance Survey*.

Conducted in October 2011, the survey polled Managing Partners of law firms in the US and Canada with 50 or more lawyers. Download the complete survey at [www.altmanweil.com/PGPerformanceSurvey](http://www.altmanweil.com/PGPerformanceSurvey).

## Creating Great Practice Groups An Altman Weil Online Training Series

May & June 2014

Altman Weil's ***Creating Great Practice Groups***, the definitive training program for practice group leaders, is available online in May and June 2014.

The three-part course is delivered in convenient 90-minute sessions that can be accessed on your own timetable. Bring your lawyers together for group learning, or take advantage of 24/7 access to accommodate individual schedules. Registrants will receive worksheets, checklists, templates and analytical tools to supplement training sessions.

### **Part I. Being a Highly-Effective Practice Group Leader**

*This session will discuss how to operate consistently at a strategic level, lead effectively and build a better group.*

- Clarifying objectives and priorities
- Investing your time effectively
- Motivating lawyers and leading change
- Issues of accountability and authority in law firms
- Moving your group up the competitiveness curve
- Key competencies for group leadership
- Leadership vs. management: Getting the right things done

### **Part II. Results-Driven Practice Group Planning**

*This session will set forth best practices for an effective, results-driven planning process and the key elements of a clear, achievable group plan.*

- Planning in a dynamic market environment
- Nuts and bolts of a realistic and effective planning process
- Planning roles: Group leaders, members, staff
- Gathering and using client feedback
- Finding the real opportunities
- Getting specific about tactics and implementation
- Working with multiple offices or large groups
- Solving the execution challenge

**Contact**  
Altman Weil, Inc.  
610.886.2008  
seminars@altmanweil.com

### **Part III. Planning to Win New Business**

*This session will outline a practical road map for developing new business for your group.*

- Differentiating your practice group from competitors
- Targeting high-potential prospective clients
- Leveraging key client relationships
- Maximizing referrals and cross-selling
- Winning new business: Successful consultative selling
- Making an achievable plan for new business development

#### **Registration Options**

*Choose two weeks or two months of online access. Register for one office location, or choose a firmwide multi-office site license for only \$995 more.*

#### **Two weeks of access (May 1, 2014 through May 16, 2014)**

A two-week subscription gives you access to the full course of three 90-minute sessions from May 1, 2014 through May 16, 2014. Simply login and view the sessions online any time, 24 hours a day, during the two week subscription period.

#### **Two Week Pricing**

- Two weeks - One office: \$1,395
- Two weeks - All offices: \$2,390

#### **Two months of access (May 1, 2014 through June 30, 2014)**

A two-month subscription gives you access to the full course of three 90-minute sessions from May 1, 2014 through June 30, 2014. Simply login and view the sessions online any time, 24 hours a day, during the two month subscription period.

#### **Two Month Pricing**

- Two months - One office: 1,995
- Two months - All offices: \$2,990

**Your registration includes:**

- 24/7 online access to the full course of three 90-minute sessions during your subscription period
- An unlimited number of viewings during your subscription period
- One set of program materials, with permission to distribute to all program participants

**Who should attend:**

- Practice Group Leaders
- Practice Group professionals and staff
- Managing Partners and other firm leaders
- Senior Administrators
- Anyone who directs or supports your firm's practice groups

**Program Presenter****Thomas S. Clay, Principal, Altman Weil, Inc.**

Tom Clay is a principal of Altman Weil and a thought-leader on the critical issue of law firm practice group strategy and leadership. With 30 years of experience consulting to the legal profession, he is an acknowledged expert on law firm management principles and is a trusted advisor to law firms throughout the United States and Canada.

**To Register:**

Online: [www.altmanweil.com/PGOnline](http://www.altmanweil.com/PGOnline)

Email: [seminars@altmanweil.com](mailto:seminars@altmanweil.com)

Call: 610-886-2008

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