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# Executive summary

Becoming a partner in a law firm is a significant milestone in a lawyer's career, and requires a combination of strong legal skills, business acumen, leadership abilities and a commitment to the firm's success.

The expectations of law firm partners are changing. Firms are increasingly looking for lawyers who can bring in new business, develop client relationships, and work collaboratively with others in the firm. Lawyers who have primarily focused on legal work in the past may need to develop new skills and competencies to meet these changing expectations.

This book outlines the critical factors for success, from building a strong track record to developing a loyal client base, demonstrating leadership skills and meeting the firm's criteria. Contributors to the book discuss how to network and build relationships within the firm, review the financial aspects of partnership, and how to seek feedback and mentorship from other partners.

In our opening chapter, Michael Roster outlines the issues that potential partners need to be aware of, from financial issues to work-life balance, to business development and beyond.

In chapter two, David Parnell looks at which types of firm offer the best chance of making partner. Imagine a spectrum; at one end is a practice that hasn't made a partner in over 20 years (Firm A); at the other is a practice that has made a partner in each of the last 20 years (Firm B). If you are an associate who's looking to make partner, would you rather be at Firm A or Firm B? This is, of course, a rhetorical question, but the scenario illustrates an important point – some firms are better predisposed to making partners. Or, otherwise said, some firms exhibit characteristics and attributes that can not only facilitate their making of partners, but are also earmarks or signals for the group's fertility. In this chapter, David Parnell consider some of these attributes and earmarks so that you, the hopeful associate, can make a better informed decision about the potential in your current group.

In chapter three, Jennifer Bluestein, chief talent officer, and Deb Ruffins, CMS at Perkins Coie, look at how to demonstrating readiness for partnership, with a focus on client relationships and client development.

A partner in a law firm has an extraordinarily complex and demanding role. A partner is expected to be the embodiment of an entire commercial business, encapsulating almost all the departments in one person. A partner is required to be a strategist, leader, manager, team-builder, work-winner, work do-er, financial controller, debt-collector, and compliance officer. A partner's skills are required to range from the visionary, through practical management, while at the same time focusing on the micro-detail of obscure areas of law. Chapter four, by Pippa Blakemore at Pep Partnership, analyses three key categories – the strategic skills required, the business management techniques necessary to underpin the strategy, and the personal characteristics required to fulfil this multiplicity of responsibilities. Strategically, a partner is required to evaluate objectively where the firm, department and practice areas are now, where they want to be, and how to get there. Managerially, while trying to achieve the firm's vision and implement its mission, a partner is also expected to manage on a daily basis: clients, cases, matters, the firm and individuals. Personally, to achieve those expectations, a partner is required to have many individual qualities, which are fundamentally based on self-discipline, self-awareness and self-control. This chapter identifies the core traits required to be a partner, gives examples of when to use them, tips on how to implement, the benefits and why they are important.

Staying with Pippa, we look at the importance of relationships. The ability to create, build and maintain meaningful relationships is vital for a successful partner to provide excellent legal services. Relationships have always been an essential aspect of being a good lawyer, but the increasing use and impact of AI makes strong personal relationships even more important. Relationships progress from like, to trust, to entrust. Chapter five identifies with whom attorneys should build relationships, including with clients, referrers, intermediaries and across the firm. There are a wide range of ideas on where and how to do this, including creative suggestions on networking, initiating a dialogue and ways in which to build rapport. It's important to make the most of the time invested, deciding how often to be in touch, which methods and what content are appropriate. And finally, how to turn contacts into clients and consistently meet those client expectations, so that partners turn them into their ambassadors. Many lawyers find these structured ideas abhorrent. They say, "I did not become a lawyer to be a salesperson". However, if a partner is an excellent lawyer, supported by an outstanding team, within a superlative firm, then that partner is letting down all the people the partner knows and meets, if that partner does not ensure that they and their firm help others in their time of legal need.

Paul Williams, of Shook Hardy Bacon, continues this theme in chapter six. How many times have you heard someone say, “It’s not what you know, but who you know?” Sounds simple enough, but let’s break it down. What you know matters a lot because unless you are knowledgeable and effective in your field and win the results that clients require, you will not become the “trusted advisor” that clients call when they need help, no matter who you know. Junior lawyers are confronted from the beginning of their career with the reality that what will set them apart from another is the time invested in studying and the effort invested in doing that accumulates experience and propels professional growth during their career. Junior attorneys generally learn to do this “what you know” part of the equation quite well. But, as these lawyers mature in the practice, they raise their heads and see that they are surrounded by other talented lawyers that have also worked hard and invested in professional development, each of them also winning the opportunity to play on our ultra-competitive playing field. So how does a client select a “trusted advisor” from this deep bench of talented attorneys? At this crucial moment, having established oneself as a capable competitor who can get the job done, “Who you know” now matters a lot. And who you have cultivated and developed a meaningful relationship with matters the most. Relationships are made over time. They require work and constant attention. And relationships must be year round, not only at holidays and times when they are convenient. Authentic relationships are especially fun, and they don’t feel at all like work. In this chapter, Paul argues there is no one-size-fits-all instruction guide for building relationships. But, junior attorneys can absorb tips from mentors and employ these suggestions in their practice to develop their individual approach to creating meaningful relationships that will last a career and a lifetime.

In chapter seven, Tom Bird looks at business development. It is rare for a partnership to make someone up to partner who does not have the potential to be a work winner for the practice. After all, no partnership wants to dilute its profits by promoting people to partner who are technical specialists and can’t win work. Therefore, you will need to commit to building a client portfolio. The question is – how big will you need to grow your client portfolio? Or in reality, what do you need to show in your business case for partnership to be in the running to make partner? This chapter builds on the previous two on business relationships and explores how partners can demonstrate their ability to win work.

Many young associates feel like they’re constantly spinning their wheels in the legal profession. They struggle to balance their workload, meet billable hour quotas, and maintain their physical and mental health. While

mentors and support groups can be helpful, there may need to be more for some young lawyers. That's where a coach comes in. Chapter eight, by Pamela DeNeuve, looks at how coaching can ease the transition from associate to partner. Just like an athlete needs a coach to guide their training and improve their performance, they can help young associates set and achieve goals, manage their time effectively, and develop the skills needed to succeed in their law practice.

Chapter nine then turns the focus to leadership. Managing a team of lawyers can be challenging for law firm partners, especially when some team members work in-house, while others work virtually or in a hybrid model. Mark Beese, of Leadership for Lawyers, takes a look at the characteristics of highly effective teams.

Partners are expected to contribute to the financial success of the firm, which may include investing capital, sharing profits, and taking on financial risk. Therefore, lawyers seeking partnership should have a solid understanding of the financial aspects of partnership and be prepared to make a financial commitment to the firm. In chapter ten, the first of two on financial management, Nicky Owen of Crowe UK LLP looks at the risk and the reward of becoming partner, and what people need to know and understand to be able to ask intelligent questions of management.

Chapter 11, by Tony Young and Hung Tran of BDO, continues the theme, asking:

- Does the partner understand the drivers of the firm?
- Does the firm have strong discipline in managing these areas?
- Are there policies around the distribution of profits?
- What are the firm's prospects for growth?
- Is there rigor around the management of succession with senior partners?
- Does the firm have a reliance on particular industries or clients?

The transition from employed to self-employed partner is a change in mindset in so many ways and also in the way you think about your personal tax position and how that is affected by the firm's finances. Having insight into how you are taxed and how it is calculated and on what provides a good grounding and helps to understand your finances and how to manage them. Going forward it will enable you to focus on doing your day job. In chapter 12, Nicky Owen returns to cover:

- How will you be taxed?
- When will you receive your profit share?
- What happens to your benefits in kind?
- What is the basis of taxation?
- What is “Basis Period Reform” and how does this affect you?
- What’s the difference between accounting profit and taxable profit, and why?

Finally, chapter 13 looks at wellbeing and partnership in law firms. Jean-Baptiste Lebel, head of HR at Allen & Overy, explains that the concept of wellbeing in law firms has evolved significantly in recent years, as the legal profession faces increasing challenges of stress, burnout, mental health issues, and ethical dilemmas. Traditionally, wellbeing in law firms was largely ignored or equated with financial success, productivity, and reputation, often at the expense of personal health, happiness, and values. However, a growing body of research, advocacy, and best practices supported by strong HR professional has highlighted the importance of fostering a culture of well-being in law firms especially since the COVID-19 pandemic. This major event has posed unprecedented challenges and disruptions to the legal profession, affecting the mental and physical health, productivity, and morale of lawyers. Therefore, every law firm should put wellbeing at the heart of their people strategy, especially for partners.

By implementing a true wellbeing strategy for partners, it can not only improve their own wellbeing, but also create a positive ripple effect and partners can be seen as role model for their peers, associates, clients, and the legal profession. Wellbeing and partnership status are not only compatible, but also complementary and beneficial for all stakeholders. Furthermore, wellbeing is now widely seen as essential for the success and sustainability of law firms, as it affects the quality and quantity of the work, the health and happiness of the lawyers, and the reputation and profitability of the firm.

# About the authors

**Mark Beese** is president of Leadership for Lawyers, LLC, a consultancy focused on helping lawyers become better leaders and business developers. He provides training, coaching, and consultation to firms in the areas of leadership development, business development, and innovation with law firms and other professional service firms. His clients range from small, single office firms to global Amlaw 10 firms. Mark is an adjunct faculty at the University of Denver school of law and former adjunct faculty at the Center for Creative Leadership. He focuses on issues of change leadership, team development, influence, cross-generation issues, collaboration, innovation, and design thinking. He is a Fellow of the College of Law Practice Management and has been inducted into the Legal Marketing Association Hall of Fame. Mark facilitates design thinking workshops for law firms, legal departments, and professional departments.

**Tom Bird** is a bestselling business author, trainer and keynote speaker who works internationally and specialises in all aspects of influence, selling, business development and presenting with a specific focus on professional service firms and international corporations. He has been designing and delivering training, writing business books, and speaking at conferences since 2001 and prior to that had a 12-year career in a number of sales and business leadership roles, including sales director of Northern Europe and vice president of European operations for both US and European based hi-tech companies. These roles gave Tom significant practical consultative selling, leadership, and business development experience and a real credibility and empathy with participants and the challenges they face in their daily roles and in how they approach winning work and developing client relationships.

**Pippa Blakemore** has worked for, advised, or presented to more than 400 law firms all over the world, ranging from international and national to small local firms, in many countries and across five continents. Pippa advises on key aspects of making law firms more successful, including strategy, lead-



ership, management, teambuilding, business development, marketing, and public relations. She works in a range of capacities including as interim director of business development, head of marketing, project-specific work, ad hoc consultancy, presentations, seminars, training, and coaching. Pippa is a Freeman of the City of London.

Drawing on more than 20 years of talent development and human resources experience, **Jennifer Bluestein** leads all talent strategy and human resources functions at Perkins Coie. This includes associate, counsel, and staff recruitment, development and training, performance management, employee relations, compliance, compensation, and benefits. Jennifer deftly managed low attrition during the COVID-19 pandemic and implemented innovative wellbeing programming. With a focus on scaling a large talent organization to ensure strategic talent development on both the business professionals and legal sides of the firm, she has changed the evaluation and compensation process for associates as well as implementing the role of talent advisor and strategic workforce planning within the firm. Jennifer is passionate about making law firms a better place for everyone, but particularly for women, racial and ethnic minorities, and LGBTQ+ individuals. She was an integral part of the firm's leadership during the pandemic, responding to and anticipating the many day-to-day challenges the firm faced with a fully remote workforce.

**Pamela DeNeuve** specializes in helping lawyers to increase productivity and to scale their law practice while building their book of business. She began coaching lawyers in Los Angeles, California, in 1992. She advocates for attorneys to succeed without sacrificing their mental, emotional, and physical wellbeing. She has created and delivered courses to Bar Associations throughout the US and also speaks internationally to empower the legal profession. Pamela produces an international podcast, *Lawyer of the Week*. Pamela has negotiated deals for AM100 law firms. She is a Peer Reviewer for the National Task Force on Lawyer Wellbeing, published by The American Bar Association in 2017. She is a contributor to *Huff Post* and *Medium* and has written over 200 articles regarding lawyer wellbeing.

**Jean-Baptiste Lebel** is the HR director of Allen & Overy's Paris office. He holds a law degree from Paris II Assas and graduated from Sciences Po Paris. Jean-Baptiste taught at the Sorbonne and HEC on recruitment, retention, and career management in law firms. Jean-Baptiste has over 20 years of HR experience in the consulting sector and is especially engaged in topics

related to compensation policies, recruitment, talent retention, diversity and inclusion, and wellbeing applied to law firms. He switched from head-hunting for law firms to HR, becoming PWC Legal's HR director for Paris before A&O. Jean-Baptiste has contributed to several books produced for the International Bar Association by Globe Law & Business.

**Nicky Owen** is a partner within the professional practices team at Crowe UK LLP, delivering tax advice to firms and partners alike, covering a broad and in-depth spectrum. Nicky's clients are predominately within the professional practices and include lawyers from across a variety of firms. She loves working with people, partners, managing, and finance people in firms and team members, coming up with practical solutions that work. Nicky is passionate about what she does and wants to make it simple to understand, relevant, and non-technical. To achieve this, Nicky draws from her in-depth knowledge and experience gained over 30 years.

**David Parnell** is the founder of True North Partner Placement, a legal recruitment boutique. Along with over two decades of experience in the legal recruitment industry, he is also an author (ABA Publishing and Ark Group), speaker, *American Lawyer* research fellow and former media contributor (Forbes and American Lawyer Media). David's work can also be found in the likes of *Inc.*, *The Huffington Post*, *Venture Capital Post*, *Fox News Magazine*, *Lawyerist*, *Australasian Lawyer*, *NBC News*, *National Law Journal*, *Law360*, *Bloomberg*, *Legal Business World*, *The Global Legal Post*, *Business Insider*, *NZ Lawyer*, *ABA Journal* and *The Bleacher Report*, among others.

**Michael Roster** was formerly managing partner of Morrison & Foerster's Los Angeles office, co-chair of the firm's financial institutions practice group worldwide, and a member of the firm's policy committee. In 1993, Michael was appointed general counsel of Stanford University, Stanford Medical Center, and Stanford Management Company. He subsequently was executive vice president and general counsel of Golden West Financial Corporation. Michael has also served as chair of the Association of Corporate Counsel, chair of the Stanford Alumni Association, steering committee co-chair of ACC's Value Challenge, and chair of two start-up companies. He currently teaches Contract Drafting and Analysis at the University of Southern California Gould School of Law and is a director of MDRC in New York, a non-profit organization that evaluates the effectiveness of government and other programs affecting lower- and moderate-income families and individuals.

A member of Perkins Coie's senior leadership team, **Deborah Ruffins** is responsible for all facets of the firm's marketing and business development activities. Her philosophy is that marketing is about connecting with buyers to deliver value. She applies her nearly 30 years of professional experience to guiding and advancing the firm's commitment to exceptional client service. Deb's background includes leadership positions in marketing, business development, and sales at global law firms, as well as at PwC, Accenture, and Deloitte. Along with her extensive professional knowledge, she brings a deep understanding of the challenges and opportunities faced by an evolving legal industry. Committed to diversity and inclusion, Deb is delighted to be a part of a firm whose dedication to diverse thought is a key component in its role as advisor to innovative companies and industry leaders.

**Hung Tran** is a business services partner with BDO in Brisbane. His strengths include understanding his clients' needs and building trust to ensure the desired outcome is achieved. Hung provides individuals and companies with business and taxation advice, including guidance on business structuring, succession planning, and how to effectively handle the ongoing management of a business to ensure goals are achieved. He also provides an outsourced finance function to many of his clients. Hung joined BDO in 2004 and became partner in July 2010. With a specialisation in building, construction, and property management, he leads the firm's real estate and construction sector team.

**Paul Williams** is the managing partner for Shook, Hardy & Bacon's Denver office and the co-chair of the firm's general liability litigation practice group. He is also on the firm's executive committee. Paul partners with clients to create relationships that achieve better legal outcomes. He believes win-win partnerships with clients are built on collaboration, innovation, strategic action, and trust – all of which ultimately bring better results and the metrics to prove them. Paul has been named a Client Service All-Star by BTI Consulting for his client-first-focused relationships. *Best Lawyers in America*, *National Law Journal*, *Benchmark Litigation*, *Who's Who Legal* and *Chambers USA* have all recognized Paul based on his legal success and client input. Paul is a featured speaker, panelist, author, and resource for publications and organizations including *The American Lawyer*, the American Bar Association and the Association of Corporate Counsel.

**Tony Young** is a partner in the business services division at BDO. With over 40 years in the chartered accounting profession, Tony brings impressive experience providing taxation and commercial advice to a diverse selection of clients, including professionals, property developers, manufacturers, and retailers. Tony deals with clients from wide-ranging backgrounds, particularly family-owned and operated businesses. He also provides strategic advice to professional service firms who are looking to grow their business.