



Turning OVER *the* Reins

Hiring Professional Managers Frees Attorneys to Practice Law

— By Cliff Collins —

Their titles and range of responsibilities vary, but professional managers of law firms fulfill one general purpose: to handle the business side of running a legal practice.

Delegating nonbillable tasks to administrators allows attorneys “to do what they do,” says Traci Ray, executive director of Barran Liebman since 2013. “It’s a really smart idea to have a strong, intelligent team overseeing the business of the firm so that lawyers can practice law.”

For Kathee S. Nelson, director of operations for Parsons Farnell & Grein, the reasoning is as straightforward as this: “Your job is to practice law, but you’re also the owner of a business. That takes time and different areas of knowledge not taught in law school.”

The trend, previously more common among big East Coast firms, has taken hold in Oregon over the past several years. Schwabe, Williamson & Wyatt, one of Oregon’s largest law firms, broke with its 125-year tradition in 2017 and created the CEO position, then appointed attorney Graciela Gomez Cowger to that role.



Kathee S. Nelson

These new positions are an “indication of the realization that a law firm must be run as a business,” says Bill Wright, firm administrator of Lindsay Hart. Competition is increasing, he says, so maximizing profitability requires having “more business controls in place.”

Wright, who holds a master’s degree in business administration, says law firm managers “have to know a little about everything” related to the business of law. The job is not easy but is exciting and rewarding, because a manager builds connections with every individual in the firm, and makes decisions affecting everyone. Says Wright, “Although in most law firms the big decisions are ultimately made by the designated partners of the firm, you have a say in whether the firm is profitable. You empower people’s daily work lives.”



Graciela Gomez Cowger

Shauna Manner, firm administrator of Larkins Vacura Kayser, who, like Wright, has an MBA, agrees that professional managers must possess broad knowledge, and that a business background is useful. As a result, Manner, who serves as president of the Oregon Chapter of the Association of Legal Administrators, says she and many of her counterparts in law firms turn to professional organizations such as ALA to help them manage the various aspects of

their work.

For instance, she holds a Certified Legal Manager certification from the ALA, in addition to certification from the Society for Human Resource Management and from the Human Resource Certification Institute. And, depending on the scope of their respective duties with a law firm, her colleagues may belong to these or other specialized organizations such as the Legal Marketing Association or the International Legal Technology Association.

Making Difficult Return-to-Work Decisions



Shauna Manner

Manner adds that interacting with peers through these groups has been especially useful when assessing how and when to return to the office during the pandemic, which continues to be a source of stress for legal managers.

Some of the 100 members of her association handle only specific areas such as human resources and recruiting, while those such as Manner manage all of the firm’s business operations.

Steven T. Seguin, chief operating officer of Sussman Shank and a past president of the ALA Oregon chapter, says the pandemic has



Steve T. Seguin

underscored the importance for firms to have professional management in place. Seguin has compiled over 30 years of experience in the legal industry, and he says COVID-19 has caused “a seismic change.”

It’s Seguin’s job to develop and implement a return-to-work strategy. “How people work will change. I don’t think we’re ever going back to the model we had. There will be a remote component. The market is going to decide part of that. We’re looking at the challenges and opportunities of working in a hybrid model, not one-size-fits all. I feel that the firms that can do that are going to be successful.”

Seguin adds: “People in my role now have really been challenged.” The psychological aspect of being separated from your peers, colleagues and clients has exerted the greatest impact, he says. “Keeping the firm together and people’s spirits up has been a substantial challenge. How do you maintain your culture and relationships?”

Lindsay Hart’s Wright agrees: “Firms are going to have to ask themselves difficult questions (such as), ‘Are you willing to lose some people if they prefer remote and the firm has a policy requiring work in the office?’ I personally think it’s a fundamental paradigm shift from people’s view of how they interact with their employer.” In the beginning, most people didn’t think of working remotely as a benefit, but “people adjusted to it, and in some ways, it has become a benefit. It’s been incredibly difficult to have such a change of the status quo,” he says. The pandemic forced fast change on a profession that normally is slow to change.

In addition, remote work compelled firms to focus on cybersecurity because “law firms are a profitable target for bad actors,” Wright says. “It only takes one click to ruin a business,” he says, referring to ransomware attacks. His five-year plan for the firm got compressed into one year. Fortunately, he had set up a team that helped firm members and staff be able to work remotely quickly in the event of a disaster. “That’s one element of why you would want someone who knows a little bit about everything, or you’re restricted on what you can do and plan for,” he says.

Lawyers as CEOs

Most legal managers in Oregon are not lawyers. Two notable exceptions are Ray and Cowger.

As part of a two-year process to establish a new strategic plan, Schwabe decided in 2017 to create the CEO position after 17 years of co-leadership under Mark Long as managing partner and David Bartz Jr. as president. According to Long, who served on the selection committee to fill the new position, “We identified the qualities we wanted in a leader and set up a rigorous process.” Cowger, the eventual pick to fill the role, brought “fresh ideas and enthusiasm.” In addition to that, says Long, unlike many lawyers, “she thinks linearly. A lot of lawyers do not.” That kind of thinking lends itself well to taking an organization and “getting it to the goal line,” he says.

Cowger had worked as an electrical engineer before practicing law and says, “that experience instilled in me a lifelong interest in innovation and process efficiencies and metrics.” She believes her background in the technology industry gave her a

Opposite Page: Traci Ray leads a group in her role as executive director of Barran Liebman. She has served in this capacity since 2013.

valuable perspective on a changing world that sharpens her role as CEO.

Edwin A. Harnden, co-managing partner and previously sole managing partner of Barran Liebman (for a combined 36 years), calls Schwabe's move to appoint Cowger "a great hire," and says his own firm's appointment of Ray as a lawyer and executive director brings similar "credibility with lawyers." He acknowledges lawyers don't want to be told what to do, which makes the transition to a full-time executive director a tricky one. You need full buy-in from everyone at the firm.



Edwin Harnden

In today's complex legal world, an attorney with a full-time practice cannot oversee and run all aspects of a firm as effectively as a legal manager, says Harnden. "The things you're missing are not just monitoring, but, 'How do we get ahead of the game?'"

Harnden also notes that "firms have had administrators and office managers, but that's different from being an executive director." In that role, Barran Liebman's Ray is responsible for all four core business initiatives: marketing, technology, finance and management, including recruiting and retention, as well as overall day-to-day operations.

Ray, chair of the American Bar Association's Law Practice Division, says law firms in the South and on the East Coast historically have staffed positions such as hers more than in other regions. But she observes that more law firms elsewhere are joining "a whole world of professional services firms" in realizing the value of hiring one or more individuals to manage the business for them.

"They are saying, 'We want to practice law, and to do that well, we need a professional to manage the business side of our firm,'" says Ray. As part of her position, she shares with Barran Liebman's co-managing partners Harnden and Andrew Schpak the task of recruiting, training and retaining associates, as well as support staff.

"It's a fun, faced-paced job," Ray says. "You have to be a problem-solver, a quick-implementation type of person. It's exciting watching people enjoying their job. That's my ultimate goal: I want an environment where attorneys can love their profession and do their best work."

She adds that being a lawyer herself has been an advantage, one that has helped her build trust and rapport with firm members over the years. Ray says her job is "consistently challenging, and one complex aspect of that is that you're making decisions about people's hard-earned money. Everything you do is affecting the bottom line. Managing your peers can be a wonderful experience if you have built a foundation of confidence."

Shayda Zaerpoor Le, a partner with Barran Liebman, says Ray relied on her own involvement with multiple legal and community organizations while recruiting Le and helping her develop into a partner. When Le was an associate at another firm she applied for a position at Barran Liebman that already had been filled. Ray nevertheless met with her and, over a period of time, encouraged Le to join, and eventually to lead or co-lead, various law-related groups. When the firm had a later opening, Ray asked Le if she was interested in applying and interviewing.



Shayda Zaerpoor Le

"Through the course of that engagement, we both developed a more meaningful understanding of each other, and as a result, when I applied for the opening at Barran Liebman, I also knew a lot about Traci and the firm culture before doing so," Le says. "Her engagement with not only the firm, but with lawyers in the community, is a lot of what uniquely places her to facilitate those connections and to develop meaningful relationships. This approach extends not just to hiring, but to internal development, and the way that she helps to facilitate career planning for people who work at our firm, as well as relationship-building between attorneys and staff."

A Legal Assistant Background

A common route to becoming a firm administrator or manager is to start out as a legal assistant. This was the path followed by Nakia Bradley-Lawson, director of operations and facilities at Gevurtz Menashe.



Nakia Bradley-Lawson

"It has helped me tremendously," she says of being a former legal assistant. "Mostly because I know what it takes to get what attorneys are looking for."

Now at the firm for about 14 years, Bradley-Lawson shares management duties with a director of finance and a director of recruiting and training. Her own responsibilities include overseeing technology initiatives and implementations; developing and implementing policies about how work gets done; overseeing maintenance of the two buildings owned by the firm; and supervising construction and design of new buildings. She also manages staff and works with the director of recruiting and training to oversee new employee training.



Kaci Price

"I believe with the two other administrators and two managing partners, that collectively we can solve anything," Bradley-Lawson says.

Kaci Price, office manager of Lynch Conger, a firm based in Bend and with an office in Portland, also came up through the ranks. She started out as a legal clerk in a law firm, then moved to head receptionist, then legal assistant, working in firms of different sizes that had different emphases, which gave her "a broad background in the legal field," she says. Price gained a total of 17 years of legal experience working as a legal assistant in business, estates and trusts, probate and civil law.

She manages the firm's accounting, financial and business operations, as well as human resources. Her experience allows her to jump in and support legal assistants, paralegals and attorneys in all areas of the firm. That experience gave Price "a better understanding of staff needs and attorney needs due to the fact of having done that work before," she says. "I still have associates come to me and say, 'I have this legal question.' It's definitely helped me in my role as the

office manager. There is trust built there. I understand and can work through a client, staff and attorney point of view, which makes things easier for me to understand. It's a hard position, but I love what I do."

Parsons Farnell & Grein's Kathee Nelson also began her three decades of experience as a legal assistant. Although she says she knows successful law firm managers who don't have that background, "for me, it has been invaluable. In working with staff, when they explain their needs, I understand their concerns." And in working with attorneys' billing and finances, she is familiar with the ethics of legal practices, such as keeping client funds separate, Nelson says. She reminds attorneys if they are spending time working as their own secretary, they are missing out on billable hours.

Nelson says the downsizing at many firms as a cost-saving measure during and following the Great Recession often proved counterproductive. "It became clear (to attorneys) that you can't bill if you're doing recruiting and HR," and also that they may lack the "skill and knowledge that goes into functioning in those roles. It doesn't work if you don't have that background." She believes the attempt to wear too many hats reinforced the value of having a legal manager.

Granting Autonomy

Like Lindsay Hart, the Hershner Hunter law firm in Eugene was fortunate, in the face of the pandemic, that its firm administrator had helped lead preparations toward what was envisioned as a paperless office. Jeffrey S. Cook joined Hershner Hunter as firm administrator in 2000. The firm transitioned to a cloud-based financial and practice management system and electronic client records a couple of years ago, giving its attorneys the capability of working at home when needed.



Jeffrey S. Cook

"We've always had an IT manager. Having that person in-house leading up to and during the pandemic was a real benefit," he adds.

Cook, who earned a master's degree in health care administration and worked in that field for 15 years prior to his stint at Hershner Hunter, functions like a chief operating officer. He says no two days are the same, which he loves but also finds challenging. Recently, staffing for legal assistants has become an area in which he's needed to adjust his thinking. "We've seen a decrease in qualified applicants the last five years, to the point where we've changed our model," he says while adding that the firm now is willing to hire talented people who don't have as much experience.

"To succeed in a professional practice manager's role, you have to work side-by-side with the firm's managing partner or CEO to help set the direction you're going, so that the rest of the professionals are following," Cook observes.

Lindsay Hart's Wright concurs: "It's hard for folks to give over that control if they have never had a nonattorney manager. Firms need to decide: What are they going to give up and why? It's important that autonomy be given to the person. The business manager needs a seat at the table. That's really difficult for a partnership." He sees the situation as similar to why a client hires an attorney: because of that lawyer's training, education and experience. If the firm

doesn't grant that same consideration when hiring a manager, the relationship is "likely not going to work out," Wright says.

Sussman Shank's Seguin says his firm's business management philosophy from its founding was that its attorneys "want to practice law and take care of our clients. They've always given me a fair amount of autonomy to manage the business operations of the firm. I really enjoy my role in this firm."



Hansary A. Laforest

Hansary A. Laforest, an attorney with Sussman Shank and a member of the Oregon State Bar Civil Rights Section Executive Committee, echoes the sentiment that putting a professional manager in charge of the day-to-day details of business and operations gives law firms a tremendous advantage. Laforest, who previously practiced in New York state and Texas and has nine years of courtroom experience, is particularly able to see the contrast, because his previous firms lacked this asset. An example he points to is that, after the George Floyd killing last year prompted a movement and a renewed emphasis on racial justice, COO Seguin recognized the need to develop an internal diversity committee at Sussman Shank, which he asked Laforest to chair. Seguin also connected with his counterparts managing other law firms to gauge how they were approaching diversity and inclusion issues. "That wouldn't have happened if we didn't have someone who was able to step back" and see what the firm needed to do to address the issue, and to determine how Sussman Shank could increase its commitment to recruiting and retaining diverse staff members, Laforest says.

Over the 11 years John R. Griffin has been firm administrator for Saalfeld Griggs, Salem's largest law firm, his areas of responsibility have expanded. "As I've grown in the position, it's become more strategic, rather than, 'What do we need to do to keep the firm going?'" he says.

"It's a challenging job, and attorneys like to see fact and precedent," Griffin says. "You always have to be prepared with numbers. They like to see data." He works closely with the managing partner and feels that a synergy results from having both an "attorney manager and nonattorney manager. It kind of balances us both out." For example, sometimes legal managers "get focused on payroll, without fully understanding the impact on the firm. I enjoy having an attorney to bounce ideas off of," he says.

Depending on their size, location and specialty areas, law firms may charge professional managers with varied duties, but their overall objective is the same, Griffin says.

"Every administrator has different roles, but the end result is to help the firm progress and move forward, and we provide support the best we can." ■

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