Succession Planning for Your Next Firm Administrator

It’s time to document crucial day-to-day information and craft a succession plan for your next administrator.

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Many firms have developed a written succession plan to assist with transitioning the managing partner role. However, when it comes to the operational leaders of the firm who are responsible for the day-to-day functions, the topic of succession planning usually falls short.

Law firm administrators are in charge of the day-to-day operations of a law firm. From vendor relations to managing nonlawyer staff members, law firm administrators coordinate and direct the daily activities of law firm management. Your firm administrator possesses a great deal of knowledge, key experience, information and skills about the operations of your firm.

However, what if one day your firm administrator walks into your office and tells you that she or he is planning to retire next month. Or, even worse, what if your administrator suddenly becomes gravely ill? Will you be left scrambling trying to figure out how the guest Wi-Fi login credentials and password are stored, or where the telephone number to your photocopier repair representative is housed, or perhaps something as simple as how many vacation days are available to your paralegal? Once the initial shock dissipates, what action steps will you take? Are you prepared to hire an immediate replacement or bring in a temporary or interim firm administrator?

In solo and small firms there tend to be fewer written job descriptions and procedure manuals for law firm administrators. Although it’s important to develop a succession plan for your law firm administrator regardless of the size of your firm, it’s very critical for solo and small law firms because the firm administrator holds key organizational and operational knowledge that may not be recorded anywhere that is readily accessible.

Now is the time to develop a succession plan for your office manager before it becomes too late. The succession plan should be clearly defined, well documented and provide a transparent path to minimize disruption and maintain continuity.
Step One: Identify and Clarify

Chances are you were responsible for hiring your current firm administrator, and chances are you even created a job description defining the duties and responsibilities for that administrator. However, before you dust off your administrator’s job description and use it to create a succession plan for your next administrator, take the time to revisit your current administrator’s daily responsibilities. Chances are some of his or her duties and daily tasks have changed, especially if your administrator has been in his or her position for over 10 years, and most certainly if he or she has been in place for more than 20 years. From technology to additional staff members, your firm administrator is no longer performing the same tasks using the same methodology and skill sets. Therefore, step one is to identify and clarify the role of your administrator as it is presently being performed.

One way to determine what your administrator is doing on a daily basis is to interview him or her. You need to determine what skills are currently required and what skills will be needed to perform the job. Ask your administrator to keep a daily diary for one month documenting his or her day-to-day tasks from the moment he or she arrives at the office in the morning to the time he or she leaves in the evening. Your firm administrator’s daily routine will assist you in identifying, redefining and creating an accurate description of the position and what you will need to look for in the next administrator.

You might be surprised that, depending on the size and structure of your firm, your administrator’s daily routine may include not only addressing staffing, vacation and personal issues but also fixing the multiple paper jams at the photocopy machine(s) and assisting attorneys with their remote login access. These tasks may not have been among your firm administrator’s job description 15 years ago when the photocopier machine was new and very few attorneys worked remotely.

Step Two: Redefine the Position and Requirements

Now that you’ve had an opportunity to read your current administrator’s diary and interview her or him, you might need to change the position and/or title to meet the current needs of the firm. For example, when you hired your firm administrator, the firm employed four legal assistants and one paralegal and was responsible for the workflow coordination and management of all legal support staff. Today, however, 20 years later, the firm employs 15 legal assistants, two document management clerks and three paralegals. In addition it has developed a newly created legal support coordinator who is now responsible for the workflow management of the legal support staff, and this legal support coordinator reports directly to the firm administrator. As the job has changed, the required skill sets have likewise shifted.

You have to redefine the position and update the firm’s organizational chart. You will need someone with leadership and management skills since your current administrator probably developed those “on the job.” These changes better reflect today’s reality, help
remove the guesswork from your new hire and allow a greater chance for a successful replacement.

**Step Three: Assess Your Leadership Gaps**

Technology introduced during the past two decades has changed the way lawyers practice law. In the early 2000s a great deal of an attorney’s billable hours were performed within the office. Except for court appearances and depositions, attorneys rarely worked from home or outside of the office on a regular basis. Fast-forward to 2019, where a large majority of a lawyer’s billable hours are performed in out-of-office venues.

Statistics show that number will continue to increase. Technology has most certainly created the need to have a person on staff with specialized knowledge in remote connections, mobile technology and effective antivirus protection, someone who can fill in the gaps of even the most tech-savvy firm administrators.

If you hired your firm administrator over 10 or 15 years ago, the chances are good that you did not employ a separate IT coordinator. If you are replacing your administrator, you might want to consider a firm administrator with strong technology skills, especially if you are not currently looking to add an additional IT person to the firm. Depending on the size of your firm, you may prefer to hire an additional IT person in order to allow your firm administrator—whether current or new—to focus on staff management.

**Step Four: Interviewing and Hiring**

With your revised or newly created firm administrator’s job description, you are now ready to begin the interviewing and hiring process. You should announce to all members of the firm that your present administrator is leaving so that you can open an opportunity to discuss any changes in leadership expectations, duties or requirements before hiring a new administrator.

Take your time with the interviewing process. This includes vetting any internal applicants who might be promoted into the position. Do not allow the looming last day of your current administrator to rush you into hiring too fast just to fill the position. Depending on the number of years your current administrator has been in the position, and the circumstances of his or her departure, your interviewing process would benefit from having the outgoing administrator help with the interviews of potential successors. This can be quite beneficial when your firm administrator has been in the position for a decade or more and is retiring. That kind of time and experience can help focus questions and explore relevant experience in candidates.

The interviewing and hiring process is a good time to create and distribute a new organizational chart. This will prepare staff members and attorneys to ask any questions about the upcoming changes and to prepare for new leadership.
You want to have a level of “comfortable transparency,” where all members of the firm are aware of what is going on in the firm and allows time for them to prepare for, and then adjust to, the changes. Remember that change is difficult and can be uncomfortable even if it’s introduced for the best of reasons.

Internal promotions can present their own challenges when you are promoting a nonexempt staff member into the exempt position of firm administrator. When promoting from within, make sure your internal candidate is comfortable and has the leadership skills to transition from employee to manager.

**Step Five: Shadowing**

Once you have hired your current administrator’s successor and where time allows, set aside two to three weeks of “shadowing.” Having your new firm administrator shadowing your present administrator can be helpful in creating a smoother transition, not only with the workflow but also among other members of the staff. The shadowing process should begin with your current administrator “creating the shadow” and your new hire standing in it. This will allow your new administrator to learn the firm’s computer programs and the administrative filing system, as well permitting the new hire to ask a plethora of questions that you might otherwise have to answer.

During the second week of shadowing, the roles should switch, with your soon-to-be-former administrator now standing in the shadow and your new hire creating it. This will similarly foster hands-on training with your current administrator and provide an opportunity to ask any additional questions now that he or she is actually performing the duties that are required.

While the shadowing is taking place, be sure to communicate to all members of the firm that during the second week of the shadowing period, the duties have shifted to, and any questions should be asked of, the new administrator. This will allow your new administrator to develop ownership of the position and the soon-to-be-former administrator to act more as an in-house consultant who can transition to being a part-time outside consultant for an additional period of time—if all parties are agreeable.

Succession planning for law firm administrators is about continuity and avoiding disruption in the daily operations of law firm management. Although the level of required planning for hiring an administrator is not as detailed and structured as it is when hiring a new managing partner, it’s nonetheless an important tool that is necessary to maintain profitability within a law firm, regardless of its size, and if you do not have a plan in place, you should create one today.