Management in a Nutshell: Simple things to do and to avoid

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Agenda

• Intro

• PART I: What is management?

• PART II: What to do? – case study

• Conclusions
What is management?
Managing is tough
I. Manage YOURSELF

II. Manage your NETWORK

III. Manage your TEAM
I. Manage YOURSELF

Explore foundations of your leadership
Use different sources of power
Be trustworthy

II. Manage your NETWORK

Develop three networks: strategic, operational, personal

III. Manage your TEAM

Create common vision
Determine the rules
Delegate
See both: team and individuality
Solve conflicts
Manage changes
Firm Structure – System mode

Liu, Shen & Associates

Equity Partners 20
Non-equity Partners (partner pool) 40
Senior attorneys 80

8000+ Patent filings
500+ Foreign filings
16000 OAs
100+ Invalidations
50+ Litigations

Partners Meeting

440 total staff
200 attorneys

M.E.  E.E.  C.E.  Docketing  Trademark & Design  Litigation  International Filing

ACTING FOR THE IP PROFESSION WORLD WIDE
Manage the operation

Manage the personal

Manage the “management”
Set up “institutional rules” (Partnership Agreement), avoid potential instability factors among partners

- Embrace a spirit of cooperation and compromise, avoid unwilling cooperative with others
- Adhere to clients first policy, strengthen “firm-client” principal, avoid clique
- Strive to sufficient communication, share opinions, avoid dictatorship
- Encourage team work, maximize expertise, avoid solitary activity
- Adopt “soft” evaluation mechanism, rigid “hours” or “billings” may not work well for a firm under “systemic” management
Manage the personal

Attorneys:
- Shape clear path for their professional career development
  - Exert strength and expertise
  - Recognize all contributions
  - Encourage team works

Supporting Staff:
- Select competent people
- Provide extensive training
- Encourage team works
Manage the operation

- Specify group tasks clearly
  - Balance staff and assignment of tasks
- Avoid excessive independence among groups
- Share responsibility for complex tasks
  - Assume tasks under supervision
  - Provide strong IT support – user friendly access, set up limits of authorization
Attorneys

Shape clear promotional path
Provide “senior allowance”
Recognize all contributions

- Rain Markers
- Mentors
- Technical Experts
- Big “Billers”
- Litigators

Equity partners
(10 - 12 years, 10%)

Partner pool — share a part of the firm’s profits (8-10 years, 20%)

Senior attorney — senior allowance
(4-5 years, 70%)

All partners benefit from the firm’s profits by shares
Team Work

Project – attorney team
- Leading attorney
- Technical support
- Paralegal

- Firm client
- Attorneys not work for a particular partner, but for the firm
- Team work between attorneys and supporting staff
- Team work among all departments
- “project” – select attorneys firm wide
- Working together for a case, not competing on similar cases
### Shall and Shall Not

| Communicate          | Information to firm members and support staff essential to team belonging  
|                     | Reaffirms culture and firm direction  
|                     | Avoids misunderstandings about why decisions made  
|                     | Engenders trust in management  
| Client service       | Make this a mantra  
|                     | Paramount importance that client service not be affected by “good enough” short cuts  
|                     | Strive for 100% client satisfaction and over deliver  
| Plan constantly      | Failure to plan is planning to fail  
|                     | Re-evaluate decisions affecting firm assets – firm and clients  
|                     | establish procedures to deal with changing markets, retirements and disaster recovery  

**Shall and Shall Not**

<table>
<thead>
<tr>
<th>Don’t live in the past</th>
<th>Management role</th>
<th>Solve problems</th>
<th>Firm clients</th>
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Previously successful methods may no longer be appropriate. Recognize generational attitude changes. Change is the only constant.

More than operation and execution of policies - can’t be laissez-faire. Focus on people development, influencing positive behaviour. Encourage teamwork. Empower people. Take intelligent risks.

Focus on solutions, not the blame. Realize that problems will arise and have a process to deal with them.

Every client is a firm client. Don’t over compensate origination. Avoid a ‘my client’ culture.
### Shall and Shall Not

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<td><strong>Bad behavior</strong></td>
<td>Don’t reward it</td>
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<td>Guard against damage to the firm’s reputation</td>
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<td>No one gets a pass for bad behavior</td>
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<td><strong>Recognize all contributions</strong></td>
<td>Fee enablers are as important to the firm’s overall success as fee earners</td>
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<td>Recognize support staff contributions</td>
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<td>Make the firm inclusive and not exclusive</td>
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<td><strong>Principles are bedrock</strong></td>
<td>Avoid long-term damage to morale by giving into demands that go against established firm principles</td>
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<td>Be mindful of market forces and personnel changes and their impact on the firm’s mission statement</td>
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<td>Re-evaluate the firm’s performance constantly</td>
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Key Learnings

**Values** - fundamental DNA of the organisation that cannot be compromised and leaders should always adhere to and defend firm’s values.

**Vision and strategy** – set direction and priorities for the firm, embraced by and shared with the whole organisation.

**Clients** – put your own focus on clients and have the whole organisation focused on value creation for the clients regardless of individual responsibility.
Key Learnings

**Communication** – one of the key tasks of leaders that can never be overdone.

**Leadership and management** – managers do things right and leaders do right things, both are needed. Professional organisations need strong leadership, use judgement in management – sometimes less is more.

**People selection and promotion** – not all great experts make good leaders, and even good leaders need attention and coaching.
Key Learnings

**Metrics and targets** – people need to know how they are evaluated and assessed, and targets need to be aligned with overall targets of the firm. You get what you measure.

**Consistency and perseverance** – stay on course and no frequent U-turns.

**Your own example and personal style of leadership** – energy and passion. Conflicting messaging eat trust, which is key element of successful organisation.

**Mistakes and failures** – these happen to all of us, the key difference is what you learn from these and how you bounce back.
What to do when you are a manager?

*case study*
How to solve case study?

I. Find your team
II. Solve case study
III. Present results

1. Examine case study
   • Analyze business environment
   • Define nature of the organization

2. Identify the key issue
   • Name the main problem

3. Analyze solution
   • Analyze the respond to the problem
   • Find pros and cons of the respond
   • List rules followed by managing partner
   • Decide if you recommend implementation of this solution

4. Find alternative solutions*
   • List other possible responds
   • Recommend what should be done

* Additional task for volunteer teams
Conclusions and recommendations
„Traditional” model

Key characteristics

Pros and cons of the model

What to do? What to avoid?
„System” model

Key characteristics

Pros and cons of the model

What to do? What to avoid?
„Hybrid” model

- Key characteristics
- Pros and cons of the model
- What to do? What to avoid?
Thank you!