

# Case Study #2 - Big Cog in a Little Wheel

28

## **The Situation**

Margaret is a Gen-X widow with two teenagers at home. She is a child of immigrants, and English is her second language. She graduated from Cal State Long Beach 20 years ago, obtained her law degree at night at a local law school, and made partner at a small boutique law firm in Los Angeles by dint of incredibly hard work and exceptional courtroom results.

The firm's Managing Partner, Pascale, has made it clear that she expects Margaret to take over as Managing Partner<sup>64</sup> when Pascale retires in about three years. Margaret is enthusiastic about the prospect, but with a caveat: her focus on litigation and the firm's small size has precluded her from any management or leadership experience.

Margaret is deeply concerned about preparing herself for the sharp increase in the Managing Partner's non-legal responsibilities.

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64 Managing Partner is a really a misnomer. While it certainly requires management, it is much more leading than managing. Most firms, even small ones, have a full-time non-lawyer Chief Operating Officer to do the preponderance of the managing. The Managing Partner is really the leader of the law firm.

### **The Big Picture**

Margaret's big picture is different from Sasha's—she has no managerial experience at all. However, with the support of the current Managing Partner, her elevation to Managing Partner in three years is pretty close to a sure thing.

Her challenge is that she knows nothing at all about managing (never mind leading). So, she needs a crash course in both managing and leading.

### **Focusing**

Margaret and Pascale sit down for a long morning with an executive coach to map out a three-year strategy for the successful handoff of the Managing Partner position from Pascale to Margaret. They develop a detailed plan with frequent feedback.

In addition to meeting monthly with her executive coach, Margaret enrolls in a part-time micro-MBA program at a prestigious local university, paid for by the firm and with work time allocated to the course.

There are two major temporal roadblocks: Margaret's family and her legal work. You can buy almost anything except more time. But you can buy services that will help you find more time.

On the home front, Margaret sits down with each of her kids, lays out the challenge(s), and asks for their help to balance her pursuit of leadership with the parental obligations of two teenagers approaching college.

On the work front, Margaret and Pascale sit down with each of the other seven partners to lay out the plan and ask for their support. Because it's a small, tight-knit group of partners, there is none of the usual politicking and posturing.<sup>65</sup>

Margaret appreciates that there are three “main things” and that there are stressors between them.<sup>66</sup>

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65 I recognize that such a peaceful transition of power is less and less likely as a firm grows larger, but the chapter is not about politics but about transitioning to leadership.

66 See the discussion related to the maxim “Nothing hard is ever easy” (chapter 16).

- ✓ On a personal level, the main thing is to keep her family thriving as a single parent.
- ✓ On an individual professional level, the main thing is learning how to be a manager and a leader, thereby preparing herself to be Managing Partner.
- ✓ On a collective professional level, the main thing is to keep the small firm working together and growing.

Balancing the three “main things,” one for each of her roles, will be a constant challenge. There will be no one correct answer, but there will be many wrong answers, such as:

- ✓ Overweighting work versus family (the classic work-life imbalance)
- ✓ Overweighting either individual professional responsibilities or collective professional responsibilities, to the detriment of the other

Margaret needs to, at least monthly, check in with each counterpart(s) in her three roles. Constant feedback and open communications are the best tools to balance the “main things” of the various roles.

She and her counterpart(s) need to accept that there will be brief periods of imbalance and that during those periods, everyone together must find ways to mitigate the impacts.

### **Leading**

When you’re trying a case, there’s only one lead attorney, so Margaret has a visceral understanding of “the buck stops here” and “lead from the front.” The transition to embracing responsibility and leading from the front will not be hard for Margaret.

What will be novel to her is the idea of having and using power. Like all leaders of talented people, the Managing Partner has an obligation to tread carefully—but eventually, Managing Partners have to make choices. Margaret needs to learn and accept

that not every choice in a consensual leadership position will be popular; her decisions need to be carefully made and then proven correct. But she has to accept the scepter and orb of power and then wield them carefully.<sup>67</sup>

### **Actioning**

Margaret is used to translating words into action. You don't excel in the courtroom by dithering or not being able to move forward. The hard part is now translating that personal bent to action to a collective bent to action. Margaret needs to start asking others, "What are you going to do differently on Monday?" instead of just herself. This transition is surprisingly hard for many!

Likewise, any trial attorney knows that surprises happen in court. If you can't improvise and adapt, you will fail. Like her ability to translate words into action, Margaret has demonstrated this skill as an individual attorney, but now she has to engender that same adaptability in others.

Likewise, the skills of asking why and planning. The biggest challenge in actioning is not knowing *how*—Margaret does—but helping her subordinates and partners behave the same way. She has to teach and demonstrate actioning.

### **Philosophizing**

Every leader has a leadership style, which they need to articulate to themselves and their team. Margaret needs to write down her leadership philosophy and hold herself accountable to it.

And she must be willing to modify that philosophy as her experience in leadership grows.<sup>68</sup>

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67 The heavily bejeweled scepter and orb are part of the coronation regalia of the English king or queen and are symbolic of the monarch's power.

68 As previously mentioned, I have attached my CEO's philosophy statement as appendix 4—and invite you to plagiarize!

## **Learning**

The three-year transition from courtroom to manager to leader will have stumbles. Margaret needs to accept that. Pascale needs to accept that. And her fellow partners need to accept that.

Using her executive coach and MBA classmates, Margaret needs to find several lawyers who have experienced a similar transition from the courtroom to the corner office. She should regularly meet with those who have trod the same path to learn from their mistakes and their successes.

Risk-taking as a leader is a balancing act between the reward and the potential downside. Margaret has to translate the return-on-investment thinking she displayed in the courtroom to the boardroom. Take some risk, but not too much risk, and certainly no unbounded risk.

Finally, and perhaps most importantly, she must listen to her partners and her kids. She needs to regularly meet individually with each of her fellow partners. Get their feedback, listen carefully both to what is said and what is not said, and act on their concerns. She needs their formal and informal support. Likewise with her children. She should regularly take each teenager out on a “date night” and probe about how it’s going and what could be done better.<sup>69</sup>

## **Caring**

Caring for herself will be one of the biggest challenges for Margaret in the transition to leadership. The impulse will be to work harder and longer, and spend as little time on self and family as possible.

The solution is effective delegation.<sup>70</sup> Margaret should hire a top-notch executive assistant and ask them to relieve her of as much of her routine tasks as possible. She needs to structure

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69 Parents of teenagers know that this is much easier said than done.

70 I spend an entire book, *7 Roles Great Leaders Don't Delegate*, on how to manage the delegation process effectively.

her day so there is built-in self-time. And she needs to ruthlessly guard her personal time.

The transformation from lawyer to manager to leader requires Margaret to take a similarly thoughtful approach to her team. It's easy to mandate more—more work, more time at the office, more, more, more... But rather than become a caricature of a bad boss, she needs to emphasize smart work, not more work.

### **So, what would you do differently?**

Take a look at the list of the 23 truths below, and ask yourself, “What else could Margaret do?”

#### **Focusing**

- If you don't know where you're going, any road will get you there.
- Make the main thing the main thing.
- What you see depends on where you stand.

#### **Leading**

- The buck stops here.
- Lead from the front.
- May the force be with you.

#### **Actioning**

- What are you going to do differently on Monday?
- Plans are nothing, planning is everything.
- Improvise, adapt, and overcome.
- It is better to sweat in peace than bleed in war.
- Why? Why? Why? Why? Why? Why?

#### **Philosophizing**

- Do what you can, with what you've got, where you are at.
- Nothing hard is ever easy.
- What's the right thing to do here?
- Life is tough, but it's tougher if you're not smart.

- KISS
- Perpetual optimism is a force multiplier.
- Everything is connected to everything else.

### **Learning**

- Those who do not learn from history are doomed to repeat it.
- Make mistakes. Learn from them. Move on.
- Listen.

### **Caring**

- Leaders eat last.
- Life is short, eat dessert first!