Lawpact

Autumn Conference
September 24 - 26, 2026
Toronto, Ontario

Host Firm:

KMB LAW

KEYSER | MASON | BALL LLP

LawPact September 2026 Conference Agenda

September 24 - 26, 2026
Hilton Hotel Toronto
145 Richmond Street

Who's Next, What's Fair, and What's AI? Addressing the Three Biggest Challenges Facing Law Firms Today

Thursday September 24, 2026 Board Meeting and Welcome Reception		
4:00 – 5:30 PM	**Board Meeting:** All Members are invited to attend.	**Governor General Parlor**
7:00 – 10:00 PM	**Welcome Reception:** Please join LawPact members and guests for an opportunity to review the happenings of the past six months and welcome our new participants.	**Governor General Main**
Friday September 25, 2026 (Governor General Main)		
7:30 – 8:30 AM	**Breakfast**	**Governor General Main**
8:30 – 10:30 AM	**Welcome, Opening Remarks, and Member Firm Introductions** Delegates introduce themselves and provide updates about their firms	**Ian Wick**, KMB Law **Doug Conover**, LawPact President
10:30 – 10:45 AM	**Break**	
10:45 – 12:15 PM	**Succession Toolkit Building the Future: A Roadmap for Law Firm Succession Planning**	**Camille Stell**, Vice President, Risk and Practice Management, Lawyers Mutual Liability Insurance Company of North Carolina

12:15 – 1:30 PM	**Lunch**	**Governor General Main**
1:30 – 2:30 PM	**Succession Planning Group Workshop** (part 2)	**Camille Stell**
2:30 – 2:50 PM	**Discussion and Takeaways**	**Scott Collins** and **Chris Clemson**
2:50 – 3:00 PM	**Break**	
3:00 – 4:00 PM	**What's New in AI?**	**Joe Marando**, Legal Innovation Partner, Harvey
4:00 – 4:30 PM	**Discussion and Takeaways**	**Scott Collins**
3:00 – 4:30 PM	**Breakout Discussion Group for LawPact Member Firm Administrators –Simcoe Room**	**Nathan Watson, Lisa Hoff**, and **Carin Cole**
7:00 PM	**Dinner** (Meet in the lobby at 6:30 for our traditional group photo; the restaurant is a .04 mile, 10 minute walk from the hotel)	**Luma,** 350 King Street West, Second Floor Reitman Square

Saturday September 26, 2026
(Governor General Main)

7:30 – 10:00 AM	**Breakfast – Omelet Station!** for members AND guests	**Governor General Main**
9:00 - 10:15 AM	**Compensation Models**	**Camille Stell**
10:15– 10:30 AM	**Break** (Adjust time as necessary)	
10:30 – 11:00 AM	**Panel Discussion on Compensation Models**	**LawPact Members**
11:00 – 12:00 PM	**Breakout Session and discussions – By practice group** (including admin group breakout)	
12:00 – 12:30 PM	**Member Discussion –** Open forum regarding LawPact and what we can be doing to support our members. **Membership Development** **Website and Forums** **Future Conference Schedule**	**Doug Conover** and **Dave Gaw**
12:30 – 1:30 PM	**Lunch**	**Governor General Main**
2:00 – 5:00 (approximate)	**Group Event – Sea the Sky: Visit to the CN Tower and Ripley's Aquarium**	Meet in the hotel lobby
7:00 PM	**Group Dinner** (Meet in the lobby at 6:15; the restaurant is a 7 minute walk from the hotel)	**King Taps** 100 King Street (First Canadian Place)

Lawpact

2026 Autumn Conference
Hilton Toronto Hotel
Washington, D.C.
September 24 - 27, 2026

Conference Delegates and Guests

Program Presenters

	**Camille Stell** Vice Presient, Risk and Practice Management Lawyers Mutual Liability Insurance Company of North Carolina
	**Joe Marando** Legal Innovation Partner Harvey

New Members

	**Jaime Mora** Arias, Alemán & Mora Panamá, Republic de Panamá ARAMO ARIAS, ALEMAN & MORA

	Babak Hoghooghi Berliner Corcoran & Rowe LLP Washington, District of Columbia	BCR BERLINER CORCORAN & ROWE LLP
	**Laina Lopez** Berliner Corcoran & Rowe LLP Washington, District of Columbia	BCR BERLINER CORCORAN & ROWE LLP

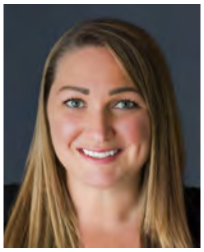
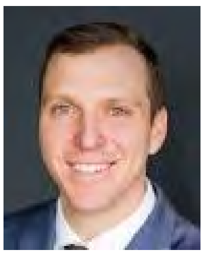
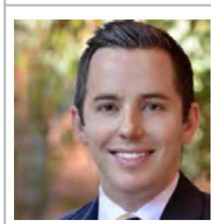
Host Firm – KMB Law

	**Amy Delisle** KMB Law Mississauga, Ontario, Canada Guest: Andrew Kirwin	KMB LAW KEYSER | MASON | BALL LLP
	**Kevin Fernandes** KMB Law Mississauga, Ontario, Canada Guest: Alexandra Del Bel Belluz	KMB LAW KEYSER | MASON | BALL LLP
	**Lisa Hoff** (Firm Administrator) KMB Law Mississauga, Ontario, Canada	KMB LAW KEYSER | MASON | BALL LLP

	**Ian Wick** KMB Law Mississauga, Ontario, Canada *Member of the Board of Directors of LawPact*

Delegates and Guests
(Alphabetical by firm name)

	**Kenichi Yagi** Adair Myers Stevenson Yagi PLLC Houston, Texas
	**Masae Tomoda** (Firm Administrator) Adair Myers Stevenson Yagi PLLC Houston, Texas
	**Carin Cole (Firm Administrator)** Adams Leclair LLP Rochester, New York
	**Steven Cole** Adams Leclair LLP Rochester, New York
	**Paul Leclair** Adams Leclair LLP Rochester, New York

	**Maura McGuire** Adams Leclair LLP Rochester, New York
	**Amy Richardson** (Firm Administrator) Adams Leclair LLP Rochester, New York
	**Robert Yawman** Adams Leclair LLP Rochester, New York
	**Charles Van Horn** Berman Fink Van Horn Atlanta, Georgia
	**Kipp WIlliams** Blanchard, Krasner & French La Jolla, California
	**John Wittemore** Blanchard, Krasner & French La Jolla, California

Nathan Welch
Bowen, Radabaugh & Milton, P.C.
Troy, Michigan

Guest: Erin Welch

Robert Brouillette
Brouillette Law
Montreal, Quebec, Canada

Member of the Board of Directors of LawPact

Guest: Francine LeDuc

Phillipe Brouillette
Brouillette Law
Montreal, Quebec, Canada

Guest: Marie-Christine Anctil

Larry Donahue
Business Law Southwest
Abuquerque, New Mexico

Guest: Kristy Donahue

Douglas Conover
Law Offices of Douglas Conover LLC
Chicago, Illinois

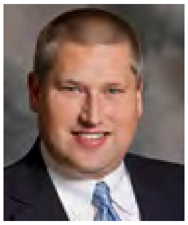
President and Member of
the Board of Directors of LawPact

Guest: Cindy Conover

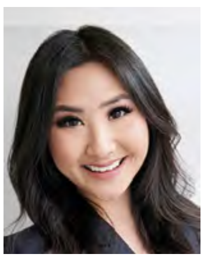
John Pickervance
Forbes Solicitors
Manchester, England, UK

Member of the Board of Directors of LawPact

	**David Aldrich** Forge IP, PLLC Shelton, Connecticut
	**David Gaw** Gaw Estate Planning Napa, California *Vice President - North America and Member of the Board of Directors of LawPact* Guests: Courtney Young and Chiara Young
	**Christopher Clemson** Gordon, Fournaris & Mammarella, P.A. Wilmington, Delaware Guest: Sarah Yannes
	**Thomas Mammarella** Gordon, Fournaris & Mammarella, P.A. Wilmington, Delaware Guest: Barbara Marsh
	**Scott Collins** Helsell Fetterman LLP Seattle, Washington Guest: Nora Collins

	**Kameron Kirkevold** Helsell Fetterman LLP Seattle, Washington Guest: Julie Kirkevold
	**Nathan Watson** (Firm Administrator) Helsell Fetterman LLP Seattle, Washington *LawPact Technical Advisor*
	**Cecelia ("Cece") Gans** Jensen McComas LLC Baltimore, Maryland
	**La'Tika Howard** Jensen McComas LLC Baltimore, Maryland **Guest: Reign Smith**
	**William McComas** Jensen McComas LLC Baltimore, Maryland
	**John Ambrogi** Latimer LeVay Fyock Chicago, Illinois Guest: Loyanna Grierson

	**Bernd Lichtenstern** Lichtenstern and Partners Landsberg am Lech & Munich Germany *Vice President - Europe and* *Member of the Board of Directors of LawPact*
	**Christel van den Reek** Mark Advocaten Breda, The Netherlands *Member of the Board of Directors of LawPact* Guest: Reiner Mayer
	**Kathy Speaker MacNett** Mette, Evans & Woodside Harrisburg, Pennsylvania *Member of the Board of Directors of LawPact* Guest: Colleen MacNett
	**Bryan Dardis** Meyers Roman Friedberg & Lewis Cleveland, Ohio
	**Anne Fantelli** Meyers Roman Friedberg & Lewis Cleveland, Ohio
	**Laura Griffith** (Firm Administrator) Meyers Roman Friedberg & Lewis Cleveland, Ohio

	**Scott Pohlman** Pohlman Law Group Ashburn, Virginia *Program Committee Chair and* *Member of the Board of Directors of LawPact* Guest: Lori Pohlman
	**Melinda Leaver Roy** Sherman Sherman Johnnie & Hoyt Salem, Oregon
	**Elaine Choi** Synergy Business Lawyers Vancouver, British Columbia Canada
	**Amy Lowe** Synergy Business Lawyers Vancouver, British Columbia Canada
	**Bonnie Coats (Firm Administrator)** THK Law South Bend, Indiana
	**Adam Russell** THK Law South Bend, Indiana

Eric Seigel
THK Law
South Bend, Indiana

Guest: Serenity Seigel

David Azrin
Wuersch & Gering
New York, New York

Guest: Judy Azrin

Sergio Yarritu
Yarritu Gonzalez & Associates
Mexico City, Mexico and Houston, Texas

Kayla Burkholder
Sandbox Events Inc.
Toronto, Ontario

On-site Conference Coordinator

12:15 – 1:30 PM	**Lunch**	**Governor General Main**
1:30 – 2:30 PM	**Succession Planning Group Workshop** (part 2)	**Camille Stell**
2:30 – 2:50 PM	**Discussion and Takeaways**	**Scott Collins** and **Chris Clemson**
2:50 – 3:00 PM	**Break**	
3:00 – 4:00 PM	**What's New in AI?**	**Joe Marando**, Legal Innovation Partner, Harvey
4:00 – 4:30 PM	**Discussion and Takeaways**	**Scott Collins**
3:00 – 4:30 PM	**Breakout Discussion Group for LawPact Member Firm Administrators –Simcoe Room**	**Nathan Watson, Lisa Hoff**, and **Carin Cole**
7:00 PM	**Dinner** (Meet in the lobby at 6:30 for our traditional group photo; the restaurant is a .04 mile, 10 minute walk from the hotel)	**Luma,** 350 King Street West, Second Floor Reitman Square

Saturday September 26, 2026 (Governor General Main)		
7:30 – 10:00 AM	**Breakfast – Omelet Station!** for members AND guests	**Governor General Main**
9:00 - 10:15 AM	**Compensation Models**	**Camille Stell**
10:15– 10:30 AM	**Break** (Adjust time as necessary)	
10:30 – 11:00 AM	**Panel Discussion on Compensation Models**	**LawPact Members**
11:00 – 12:00 PM	**Breakout Session and discussions – By practice group** (including admin group breakout)	
12:00 – 12:30 PM	**Member Discussion** – Open forum regarding LawPact and what we can be doing to support our members. **Membership Development** **Website and Forums** **Future Conference Schedule**	**Doug Conover** and **Dave Gaw**
12:30 – 1:30 PM	**Lunch**	**Governor General Main**
2:00 – 5:00 (approximate)	**Group Event – Sea the Sky: Visit to the CN Tower and Ripley's Aquarium**	Meet in the hotel lobby
7:00 PM	**Group Dinner** (Meet in the lobby at 6:15; the restaurant is a 7 minute walk from the hotel)	**King Taps** 100 King Street (First Canadian Place)

Who's Next? Building Your Law Firm's Leadership Pipeline

LawPact Conference
Toronto, Canada

September 24-26, 2026
Camille Stell, Presenter

1

Learning Objectives

- Develop a succession strategy aligned with firm values
- Define clear career paths and leadership benchmarks
- Structure equitable and sustainable compensation models
- Navigate the human side of succession transitions
- Start your succession planning today

2

Toolkit Includes:

- Law Firm Succession Readiness Snapshot
- Associate-to-Partner Roadmap
- Compensation Transition Checklist
- Succession Communication Blueprint
- Difficult Conversation Guide: Engaging Resistant Partners

3

4

The Coming Wave of Lawyer Retirements

- The profession is large and aging
  - There are **over 1.3 million lawyers** in the United States
  - The legal profession tends to have an older demographic compared to the general workforce
- A significant portion are already at or past retirement age
  - Nearly **14%** of all lawyers are age 65 or older (≈ 1 in 7 lawyers)
  - By comparison, only about **7% of the overall U.S. workforce is 65+**
- The pipeline behind them is thinner than many firms expect
  - **67%** of lawyers are age 40 or older
  - The median age of lawyers is **46.3** years
- Senior lawyers still dominate firm leadership
  - In large firms, **36%** of partners are at or nearing age 65, and some are practicing into their 70s and 80s

*Data taken from ABA 2024 Profile of the Profession

This is not a future issue—it's a current demographic reality

5

The demographic reality: aging firm leadership

Risks of failing to plan

- Client loss
- Revenue disruption
- Difficulty in recruiting new attorneys
- Revolving door of associates and younger partners
- Ethical exposure
- Malpractice exposure

Opportunity: the firm should view succession as a growth strategy

6

Common Mistakes

- Waiting too long
- Focusing only on retirement, not continuity
- Avoiding difficult conversations
- Making it personal for senior lawyers rather than framing succession planning as a law firm strategic decision

7

Why Strategy | Vision Matters

Aligning:
- Firm values
- Client base
- Practice mix
- Growth goals

Succession is not just replacement—it's reinvention

8

Key Questions for Leadership

- What should this firm look like in 5–10 years?
- Who are our future leaders?
- What clients and practice areas define us?
- Do we have a growth plan in place – for people, geography, practice areas, revenue goals?

9

Components of a Succession Vision

- Leadership model – who will lead the effort – managing partner, executive committee, succession planning committee, practice group leaders?
- Ownership structure – buy in / buy out options
- Timeline for transition
- Financial expectations – can the retiring lawyer keep an office, keep staff, collect origination fees, share in bonus pool – the smaller the firm, the more likely these questions are asked by retiring partners

10

Succession Toolkit - Manuscript

Law Firm Succession Readiness Snapshot

- Section 1: Firm Snapshot
- Section 2: Vision for the Future
- Section 3: Leadership Vision
- Section 4: Leadership Development Gaps
- Section 5: Financial & Compensation Considerations
- Section 6: Risks & Barriers
- Section 7: Action Priorities – Next 90 Days
- Section 8: Alignment Check

11

12

Path to Partnership

The Problem **-** Associates are unclear on how to advance and firms remain silent on the path forward or rely on informal promotion systems

- Identify high-potential attorneys early
- Create intentional development plans with timeframes, milestones, and scorecards
- Create compensation plans that complement the firm's goals for a path to partnership

13

Elements of a Path to Partnership

Competency Framework
- Legal skills
- Client development
- Leadership/management

Benchmarks & Milestones
- Years to partnership (flexible vs. fixed)
- Business development expectations
- Firm contribution

Evaluation & Reward Systems
- Regular performance reviews
- Transparent criteria
- Bonus structure, pay structure, buy-in structure

14

Advancing Lawyers Through the Path to Partnership

Professional Development Structure
- Mentoring vs. sponsorship
- Training programs
- Leadership opportunities

Risks of Not Defining the Path
- Talent loss
- Diversity gaps
- Leadership vacuum

15

Succession Toolkit - Manuscript

The Associate-to-Partner Roadmap provides a framework for developing associates by defining expectations, milestones, and competencies at each stage of their career.

16

17

Compensation Architecture

Compensation drives succession success by incentivizing the right behavior:

- Transition planning
- Mentorship
- Client handoff

Align money with behavior and transition

18

Compensation Models

Associate Compensation Models
- Lockstep vs. merit-based
- Hybrid systems
- Incentives tied to development – associate scorecard

Partner Compensation Considerations
- Origination credit vs. team credit (sunset origination credit)
- Rewarding transition behavior
- Avoiding "hoarding"

19

Transitioning Retiring Partners

Focus on a firm plan - not individual plans

Buyout structures
  - Fixed vs. formula-based
- Phased retirement
- Of counsel roles

Common Compensation Pitfalls
- Overvaluing origination
- Lack of transparency
- No incentives for succession
- Lack of trust on the finances – consider third-party to assist – trusted mediator, firm's CPA, outsourced financial modeling, law firm valuation, succession consultant

20

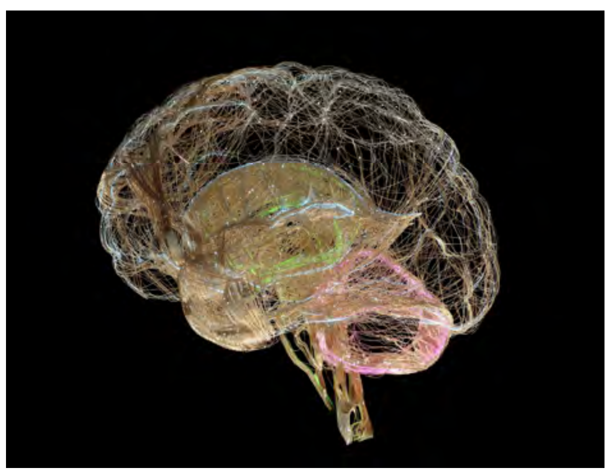
Succession Toolkit - Manuscript

Compensation Transition Checklist

- Section 1: Compensation Philosophy Alignment
- Section 2: Incentives for client transition
- Section 3: Origination Credit Structure
- Section 4: Retiring Partner Compensation
- Section 5: Phased Retirement Planning
- Section 6: Rewarding Succession Behaviors
- Section 7: Associate Compensation Alignment
- Section 8: Equity & Fairness Considerations
- Section 9: Risk Assessment
- Section 10: Action Plan – Next 90 Days

21

Human Side of Succession



22

Emotional Realities of Succession

- Loss of identity
- Loss of relevance
- Anxiety for emerging leaders
- Client concerns about continuity

The human side determines success

Help Retiring Lawyers Plan for Life After Law

- 55+ Committee
  - Mandatory membership
  - Include everyone in the firm age 55+ to share knowledge with special sessions for retiring partners only when needed
  - Guest speakers to discuss retirement benefits such as Social Security, Medicare, financial planning
  - Host programs to share ideas of what to do in retirement – hobbies, travel, volunteer work, teaching

- *Designing Your Life* by Bill Burnett and Dave Evans
- *How to Live a Meaningful Life* by Bill Burnett and Dave Evans
- *Retirement by Design* by Ida Abbott
- *Younger Next Year* by Chris Crowley, JD and Henry S. Lodge, MD

It's easier to go towards something than to leave everything behind

Communication Strategies

25

Succession Toolkit - Manuscript

- Succession Communication Plan
  - Section 1: Communication Objectives
  - Section 2: Stakeholder Information
  - Section 3: Timing & Phases
  - Section 4: Messaging Framework
  - Section 5: Client Transition Communication Plan
  - Section 6: Roles & Responsibilities
  - Section 7: Anticipating Challenges
  - Section 8: Timeline
  - Section 9: Feedback & Follow-Up
  - Section 10: Do’s & Don’ts

26

Communication Strategies

Internal
- When to start conversations
- Who to include (partners, associates, staff)
- Frequency and format

External Communication
- Timing of announcements
- Introducing new relationship partners
- Building trust early

27

Practical Concerns

Cultural Considerations
- Respecting legacy while embracing change
- Avoiding generational conflict
- Encouraging collaboration

Difficult Conversations
- Underperforming successors
- Partners unwilling to transition
- Compensation disputes

28

Case Study

- Firm A is taking in a senior partner – the firm down the street "kicked them out"
- Firm B struggled through a long succession journey – the senior partner refused to participate and ended up leaving

Two sides of the same story

29

30

Move from theory to execution

First Steps (Next 90 Days)

- Conduct firm assessment
- Identify key transition risks
- Start leadership conversations

Implementation = Turning Strategy into Action

31

First Steps to Create Your Firm's Plan

Build a Succession Team
- Managing partner
- Practice leaders
- Administrator/COO
- Outside advisors (optional)

Create a Written Plan
- Timeline
- Roles and responsibilities
- Metrics for success

32

First Steps to Create Your Firm's Plan

Accountability Mechanisms
- Regular progress reviews
- Leadership reporting

Simple Starting Point for the Transitioning Lawyer
- File audit
- Client transition list
- Leadership readiness list

33

Key Takeaways

Key Takeaways
- Succession is a strategy, not an event
- Clarity reduces risk
- Culture determines success

Audience Action
- Identify one immediate next step
- Schedule a leadership discussion within 30 days

The best time to start succession planning was 10 years ago. The second-best time is today.

34

Succession Toolkit Manuscript:

- Law Firm Succession Readiness Snapshot
- Associate-to-Partner Roadmap
- Compensation Transition Checklist
- Succession Communication Blueprint
- Difficult Conversation Guide: Engaging Resistant Partners

35

About Camille

- Fellow in the College of Law Practice Management
- Serves on the Advisory Board Legal Aid NC Innovation Lab
- Serves on the Advisory Group for Duke Law Tech Lab
- Serves on the NC Pro Bono Resource Center, Coordinators Network
- Served on the NC State Bar Regulatory Study Committee
- Frequent contributor to *NC Lawyers Weekly* and *Attorney at Work*
- Co-author, *Designing a Succession Plan for Your Law Practice: A Step-by-Step Guide for Preparing Your Firm for Maximum Value*, published February 2021
- Co-author, *Respect – An Insight to Attorney Compensation Plans*, 2nd Edition published October 2024
- Cornell University, Diversity & Inclusion Certificate, April 2021
- University of South Florida, Muma College of Business, Diversity, Equity & Inclusion in the Workplace Certificate, May 2021

36

Continue the Conversation

Camille Stell
Vice President of Risk & Practice Management,
Lawyers Mutual Liability Insurance Co. of North Carolina
Follow and Connect at Camille Stell | LinkedIn

Camille@lawyersmutualnc.com
Toll free 800.662.8843, ext 133
Direct Dial 919.447.3354

37

Succession Toolkit

What’s Fair? Compensation Strategies for Today’s Law Firm

LawPact Conference - Toronto, Canada

September 24-26, 2026

As the legal profession evolves and generations shift, law firms must proactively plan for continuity and sustainability. This course will provide practical guidance for law firm leaders, managing partners, and practice managers seeking to create a resilient succession strategy. The session will focus on:

- Vision-Driven Planning: Establishing a long-term vision that aligns with firm values and goals.
- Defined Pathways to Leadership: Creating clear expectations for associates with a structured path to partnership, including professional development benchmarks and performance metrics.
- Compensation Architecture: Understanding compensation frameworks for associates and partners, with a specific focus on transitioning ownership and income for retiring partners.
- Communication and Culture: Addressing the emotional and cultural elements that arise during leadership transitions.

Camille Stell, Vice President, Risk & Practice Management

Lawyers Mutual Liability Insurance Company of North Carolina
camille@lawyersmutualnc.com
800.662.8843 | 919.447.3354 Direct Dial

Law Firm Succession Readiness Snapshot

Purpose:
This worksheet helps law firm leaders define a clear, forward-looking vision for leadership, ownership, and continuity. It is designed to spark discussion and create alignment before detailed planning begins.

Section 1: Firm Snapshot (Current State)

Firm Name: ___________________________
Date Completed: _______________________

Number of Attorneys: _______
Number of Equity Partners: _______

Primary Practice Areas:

Average Age of Partners: _______

Partners Expected to Retire in Next 5–10 Years:

Top 5 Clients (or Client Types):

1.
2.
3.
4.
5.

Section 2: Vision for the Future (5–10 Years)

1. What do we want this firm to look like in 5–10 years?

(Consider size, structure, culture, and reputation)

2. What practice areas should grow, shrink, or remain core?

- Grow: ____
- Maintain: _____________________________________
- Reduce/Exit: __________________________________

3. What types of clients do we want to serve?

(Industries, sophistication, geographic reach, etc.)

4. What should define our firm culture going forward?

(Check all that apply or add your own)

☐ Collaborative
☐ Entrepreneurial
☐ Client-focused
☐ Work-life balance oriented
☐ High-performance/metrics-driven
☐ Other: __________________________

Section 3: Leadership Vision

1. What leadership structure do we envision?

☐ Managing Partner (single leader)
☐ Executive Committee

☐ Practice Group Leaders
☐ Hybrid Model

2. Who are potential future leaders?
(Name 2–5 individuals and roles)

- ___________________________ (Role: ____________)
- ___________________________ (Role: ____________)
- ___________________________ (Role: ____________)

3. What skills/qualities must future leaders have?
(Check top 5)

☐ Strong client relationships
☐ Business development skills
☐ Financial/operational understanding
☐ Team leadership
☐ Strategic thinking
☐ Communication skills
☐ Emotional intelligence
☐ Other: ___________________________

4. Leadership Development Gaps:

(What is missing today?)

Section 4: Ownership & Transition Vision

1. How should ownership evolve over time?
☐ Maintain current ownership model
☐ Gradual transition to next generation
☐ Expand ownership group
☐ Other: ___________________________

2. Expected timeline for partner transitions:

- 1–3 years: ___________________________________
- 3–5 years: ___________________________________
- 5–10 years: __________________________________

3. How should client relationships transition?

☐ Gradual handoff over time
☐ Shared responsibility model
☐ Immediate reassignment (case-by-case)

4. What concerns exist about transition?
(Check all that apply)

☐ Client retention
☐ Revenue stability
☐ Leadership readiness
☐ Compensation fairness
☐ Partner resistance
☐ Other: __________________________

Section 5: Financial & Compensation Considerations

1. What are our goals for financial sustainability?

---

2. How should retiring partners be compensated?
(General philosophy)

---

3. What behaviors should compensation reward?
(Check top priorities)

☐ Client transition
☐ Mentoring and training
☐ Firm leadership
☐ Business development
☐ Collaboration/teamwork
☐ Other: __________________________

Section 6: Risks & Barriers

What are the biggest risks to successful succession?

1. ____________________________
2. ____________________________
3. ____________________________

What barriers are preventing planning today?

Section 7: Action Priorities (Next 90 Days)

1. What is the most urgent succession issue to address?

2. What are the first three action steps?

1. ____________________________
2. ____________________________
3. ____________________________

3. Who is responsible for leading succession planning?

4. When will this conversation continue?
(Date for next meeting)

Section 8: Alignment Check

On a scale of 1–5, how aligned is leadership on succession?
(1 = not aligned, 5 = fully aligned)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

If not fully aligned, where are the gaps?

Associate-to-Partner Roadmap:

A Structured Path to Leadership and Ownership

Purpose:
This roadmap provides a clear framework for developing associates into future partners by defining expectations, milestones, and competencies at each stage of their career.

How to Use This Roadmap

- Use as a **development guide** for associates
- Use as a **benchmarking tool** for evaluations
- Customize timelines based on firm size and practice

Stage 1: Foundation (Years 1–3)

Building Core Competence

Primary Focus

- Legal skills development
- Work quality and reliability
- Professional habits

Key Competencies

☐ Strong research and writing
☐ Attention to detail
☐ Responsiveness and accountability
☐ Understanding of firm systems and processes

Client Exposure

- Limited, mostly observational
- Begins participating in client communications

Business Development

  - Attend networking events

    - Begin building professional relationships

Performance Benchmarks

- Meets billable expectations
- Produces consistently high-quality work
- Positive feedback from supervising attorneys

Development Goals

- Build confidence and independence
- Learn how matters are managed end-to-end

Stage 2: Growth (Years 3–6)

Becoming a Trusted Contributor

Primary Focus

- Increased responsibility
- Client interaction
- Beginning leadership skills

Key Competencies

☐ Matter management (small to mid-level cases)
☐ Direct client communication
☐ Issue spotting and problem-solving
☐ Time and workload management

Client Relationships

- Begins owning portions of client relationships
- Build trust with repeat clients

Business Development

- Expected to:
    - Participate in networking
    - Contribute to proposals or pitches
    - Begin identifying opportunities

Performance Benchmarks

- Handles matters with minimal supervision
- Demonstrates judgment and initiative
- Begins to show leadership potential

Development Goals

- Transition from “doer” to “thinking lawyer”
- Develop a professional reputation

Stage 3: Leadership Track (Years 6–8+)

Demonstrating Partnership Readiness

Primary Focus

- Leadership
- Revenue contribution
- Strategic thinking

Key Competencies

☐ Manages complex matters independently
☐ Supervises and mentors junior attorneys
☐ Demonstrates business judgment
☐ Contributes to firm strategy

Client Relationships

- Primary or shared responsibility for key clients
- Trusted advisor status

Business Development

- Expected to:
    - Generate new business
    - Maintain and expand client relationships
    - Develop a niche or focus area

Performance Benchmarks

- Consistent high performance
- Demonstrated leadership within firm
- Evidence of revenue generation or client retention

Development Goals

- Build a sustainable practice
- Show readiness for ownership responsibilities

Stage 4: Partnership Readiness Checklist

Legal & Technical Skills

☐ Expertise in practice area
☐ Strong judgment and risk assessment

Client Development

☐ Established client relationships
☐ Demonstrated ability to generate or expand business

Leadership & Firm Contribution

☐ Mentors junior lawyers
☐ Contributes to firm initiatives
☐ Demonstrates collaboration

Financial Understanding

☐ Understands firm economics
☐ Manages realization and profitability

Cultural Alignment

☐ Embodies firm values
☐ Trusted by partners and staff

Competency Matrix (At-a-Glance Tool)

Competency Area	Foundation	Growth	Leadership Track
Legal Skills	Develop	Strong	Expert
Client Interaction	Observe	Active	Lead
Business Development	Exposure	Participate	Generate
Leadership	None	Emerging	Demonstrated
Financial Awareness	Basic	Developing	Proficient

Evaluation & Feedback Structure

Recommended Review Cadence

- Annual formal review
- Mid-year check-in
- Ongoing informal feedback

Key Evaluation Questions

- Is the associate progressing along the roadmap?
- Where are the gaps?
- What support is needed?

Individual Development Plan

Associate Name: ___________________________
Current Stage: _____________________________

Top 3 Strengths

1. ______________________________
2. ______________________________
3. ______________________________

Top 3 Development Areas

1. ______________________________
2. ______________________________
3. ______________________________

Goals for Next 12 Months

1. ______________________________
2. ______________________________
3. ______________________________

Support Needed from Firm

☐ Mentorship
☐ Training
☐ Client exposure
☐ Leadership opportunities
☐ Other: ___________________________

Avoid Common Pitfalls

- Lack of clarity about expectations
- Overemphasis on billable hours only
- No business development training
- Inconsistent evaluation standards
- Failure to communicate readiness

Firm Implementation Checklist

☐ Define partnership criteria clearly
☐ Communicate roadmap to all associates
☐ Train partners on evaluation standards
☐ Align compensation with development goals
☐ Review and update annually

Compensation Transition Checklist

Aligning Incentives with Succession Success

Purpose:
This checklist helps law firms evaluate and structure compensation systems that support effective succession planning, client transition, and long-term sustainability.

How to Use This Checklist

- Use during partner meetings or retreats
- Work through each section collaboratively
- Identify gaps and assign action items

Section 1: Compensation Philosophy Alignment

☐ We have a clearly defined compensation philosophy
☐ Compensation aligns with firm values and long-term vision
☐ The system rewards behaviors that support succession
☐ There is transparency (or understood clarity) in how compensation is determined

Key Question:
Does our compensation system encourage or discourage succession planning?

Section 2: Incentives for Client Transition

☐ Partners are rewarded for successfully transitioning clients
☐ There is a defined process for transferring origination credit
☐ Credit can be shared or phased over time
☐ Successor attorneys receive meaningful credit for taking over relationships
☐ Transition timelines are established (not open-ended)

Red Flags:
☐ Origination credit is held indefinitely
☐ No financial incentive to transition clients
☐ Successors are undercompensated for inherited work

Section 3: Origination Credit Structure

☐ Origination credit policies are clearly defined
☐ The firm allows flexibility (e.g., shared credit, split credit)
☐ There is a mechanism to reassign credit over time
☐ Credit reflects actual client relationship responsibility

Key Consideration:
Does origination credit reflect who is actually serving and growing the client?

Section 4: Retiring Partner Compensation

☐ The firm has a defined retirement or buyout policy
☐ Compensation for retiring partners is predictable and transparent
☐ Buyout formulas (if used) are documented and understood
☐ There are incentives for early and effective transition
☐ Post-retirement roles (e.g., of counsel) are clearly defined

Common Structures to Consider:

- Fixed buyout over time
- Percentage of collections
- Declining compensation tied to transition milestones

Section 5: Phased Retirement Planning

☐ The firm allows for phased retirement transitions
☐ Expectations are defined for:

- Workload reduction
- Client transition
- Mentoring responsibilities

☐ Compensation adjusts as responsibilities shift
☐ Timeline is agreed upon in advance

Section 6: Rewarding Succession Behaviors

☐ Compensation rewards mentoring and training
☐ Leadership contributions are recognized financially
☐ Collaboration is incentivized (not penalized)
☐ Cross-selling and team-based client service are rewarded

Key Behaviors to Reward:

- Introducing successors to clients
- Sharing client relationships
- Developing junior lawyers
- Supporting firm-wide growth

Section 7: Associate Compensation Alignment

☐ Associate compensation aligns with the partnership pathway
☐ Incentives exist for:

- Business development
- Client service excellence
- Leadership development

☐ Compensation expectations are transparent
☐ High performers are rewarded and retained

Section 8: Equity & Fairness Considerations

☐ Compensation decisions are perceived as fair
☐ Criteria are applied consistently
☐ There is a process to address disputes or concerns
☐ The system supports diversity and inclusion goals

Section 9: Risk Assessment

Where are we most vulnerable?
(Check all that apply)

☐ Key clients tied to one partner
☐ No transition incentives
☐ Resistance from senior partners

☐ Lack of next-generation leadership
☐ Unclear compensation policies

Section 10: Action Plan (Next 90 Days)

Top 3 Compensation Issues to Address:

1. ______________________________
2. ______________________________
3. ______________________________

Immediate Action Steps:

☐ Review current compensation model
☐ Identify partners nearing retirement
☐ Map client ownership and risks
☐ Begin transition discussions
☐ Engage outside advisor (if needed)

Responsible Party: __________________________
Timeline: __________________________________

Quick Self-Assessment Score

Rate each area from 1 (weak) to 5 (strong):

Area	Score (1–5)
Philosophy Alignment	
Client Transition Incentives	
Origination Credit Structure	
Retirement Planning	
Succession Behaviors	

Total Score: ______ / 25

Interpretation:

- 20–25: Strong alignment

- 15–19: Moderate—needs refinement
- Below 15: High risk—priority action needed

Consider Common Pitfalls

- Over-reliance on origination credit
- No incentives for transitioning clients
- Avoiding compensation conversations
- Lack of written policies
- Treating succession as an exception, not a system

Succession Communication Blueprint

Managing Conversations for a Successful Transition

Purpose:
This tool helps law firms plan, structure, and execute communication around leadership and ownership transitions to ensure clarity, continuity, and confidence.

How to Use This Plan

- Complete before major transition decisions are announced
- Update as the succession process evolves
- Use as a guide for both internal and external messaging

Section 1: Communication Objectives

What are we trying to achieve with communication?
(Check all that apply)

☐ Maintain client confidence
☐ Ensure internal alignment
☐ Reduce uncertainty and rumors
☐ Support transitioning partners
☐ Position next-generation leaders
☐ Reinforce firm stability and continuity

Key Message (1–2 sentences):
What is the core story we want to tell?

Section 2: Stakeholder Identification

Internal Stakeholders

☐ Equity partners
☐ Non-equity partners
☐ Associates
☐ Staff/administration

External Stakeholders

☐ Key clients
☐ Referral sources
☐ Vendors/consultants
☐ Community/professional networks

High-Priority Individuals (List by name):

Section 3: Timing & Phases of Communication

Phase 1: Internal Alignment (Pre-Announcement)

- Who needs to be informed first?
- What decisions must be finalized?

☐ Leadership agreement reached
☐ Messaging drafted
☐ FAQs anticipated

Phase 2: Internal Announcement

- Communicate to partners, then broader team

Method:
☐ In-person meeting
☐ Video call
☐ Written memo
☐ Combination

Key Points to Cover:

- What is changing
- Why it is happening
- Timeline
- What it means for individuals

Phase 3: Client Communication

- Prioritize top clients first

Timing: ____________________________

Method:
☐ In-person meeting
☐ Phone call
☐ Personalized email
☐ Formal letter

Phase 4: Broader External Messaging

- Website, announcements, broader network

☐ Press release (if appropriate)
☐ Website updates
☐ LinkedIn or professional platforms

Section 4: Messaging Framework

Core Messaging Elements

1. Continuity

- “The firm remains strong and stable”

2. Transition

- “We are thoughtfully planning for the future”

3. Confidence

- “Clients will continue to receive excellent service”

4. Opportunity

- “This transition strengthens our firm”

Sample Internal Message Structure

- Acknowledge transition
- Explain rationale
- Introduce new leadership
- Reinforce stability

- Invite questions

Sample Client Message Structure

- Reassure continuity of service
- Introduce successor
- Highlight collaboration/overlap
- Express appreciation and commitment

Section 5: Client Transition Communication Plan

Top Clients Requiring Personal Outreach:

Client Name	Responsible Partner	Successor	Communication Method	Date

Key Questions to Address with Clients:

- Who will be my primary contact?
- Will service change?
- Will billing change?
- Who do I call with concerns?

Section 6: Roles & Responsibilities

Who is responsible for communication?

- **Overall Lead:** ___________________________
- **Internal Communications:** __________________
- **Client Communications:** ___________________
- **Media/External Messaging:** ________________

Section 7: Anticipating Challenges

Potential Concerns (Internal):

☐ Fear of change
☐ Lack of clarity about roles
☐ Compensation concerns
☐ Leadership uncertainty

Potential Concerns (Clients):

☐ Loss of relationship
☐ Quality of service
☐ Continuity of knowledge

Prepared Responses (Key Talking Points):

____

____

____

____

Section 8: Communication Timeline

Milestone	Audience	Method	Responsible Party	Date
Leadership alignment	Partners	Meeting		
Internal announcement	All staff	Meeting/email		
Top client outreach	Key clients	Call/meeting		
Broader announcement	External	Website/email		

Section 9: Feedback & Follow-Up

☐ Provide opportunities for questions (meetings, 1:1s)
☐ Monitor client reactions
☐ Conduct internal check-ins
☐ Adjust messaging as needed

Follow-Up Actions Needed:

Section 10: Communication Do's and Don'ts

Do:

✓ Be proactive, not reactive
✓ Communicate early and often
✓ Be clear and consistent
✓ Personalize client outreach

Don't:

✗ Delay difficult conversations
✗ Overpromise outcomes
✗ Rely only on written communication
✗ Ignore emotional impact

Quick Readiness Check

Rate your firm (1–5):

Area	Score
Internal Alignment	
Message Clarity	
Client Transition Planning	
Leadership Visibility	
Communication Timing	

Total Score: ______ / 25

Difficult Conversation Guide: Engaging Resistant Partners

Navigating Resistance in Succession Planning

Purpose:
This guide helps firm leaders have productive, respectful, and effective conversations with partners who are reluctant to engage in succession planning, client transition, or leadership change.

Section 1: Understand the Resistance First

Before starting the conversation, identify the *type* of resistance:

Common Root Causes

☐ **Loss of Identity / Loss of Relevance**
"I am the firm / my clients define me"

☐ **Financial Fear**
"Will I lose income or value?"

☐ **Loss of Control**
"I don't trust others with my clients"

☐ **Lack of Successor Confidence**
"No one is ready"

☐ **Avoidance/Denial**
"I'm not ready to think about retirement"

☐ **Past Firm Culture**
"No one did this for me"

Key Principle:
Resistance is usually about fear, not defiance.

Section 2: Prepare for the Conversation

Clarify Your Objectives

- What outcome do you need?
    - Agreement to start transition?
    - Willingness to mentor?
    - Timeline commitment?

Write it down:

Gather Key Information

☐ Client list and dependency risks
☐ Timeline (age, expected transition horizon)
☐ Compensation structure
☐ Potential successors

Choose the Right Setting

☐ Private, not rushed
☐ Neutral and respectful tone
☐ No surprises if possible

Section 3: Conversation Framework (Step-by-Step)

Step 1: Open with Respect and Acknowledgment

"You've built an incredible practice and strong client relationships. This firm is what it is because of your contributions."

✓ Validates legacy
✓ Reduces defensiveness

Step 2: State the Purpose Clearly

"We need to start planning for the long-term continuity of your clients and the firm."

✓ Focus on firm + clients (not just retirement)

Step 3: Frame the Risk (Objectively, Not Emotionally)

"Right now, many key relationships are tied closely to you. If something unexpected happened, it could put clients and the firm at risk."

✓ Focus on:

- Client protection
- Firm stability
- Professional responsibility

Step 4: Invite Their Perspective

“How are you thinking about the future of your practice?”

✓ Listen actively
✓ Don’t interrupt
✓ Identify underlying concerns

Step 5: Address Concerns Directly

If financial fear:

“We want to ensure you’re compensated fairly as you transition your practice.”

If control issues:

“We can structure this so you stay involved while others gradually take on responsibility.”

If lack of trust:

“Let’s identify and develop the right successors together.”

Step 6: Propose a Path Forward

“What if we started with a gradual transition plan over the next 2–3 years?”

✓ Keep it:

- Incremental
- Flexible
- Collaborative

Step 7: Secure a Small Commitment

“Would you be open to identifying 2–3 key clients where we can begin introducing another attorney?”

✓ Start small
✓ Build momentum

Section 4: Conversation Do’s and Don’ts

Do:

✓ Lead with respect and appreciation
✓ Focus on clients and legacy

✓ Listen more than you speak
✓ Offer solutions, not ultimatums
✓ Break it into steps

Don’t:

✗ Frame it as “retirement pressure”
✗ Make it about age
✗ Use threats or mandates (unless absolutely necessary)
✗ Rush the process
✗ Ignore emotional impact

Section 5: Handling Common Scenarios

Scenario 1: “I’m not ready to retire.”

Response:

“This isn’t about stepping away—it’s about ensuring your clients are supported long-term.”

Scenario 2: “No one can handle my clients.”

Response:

“Let’s work together to develop someone who can, while you remain involved.”

Scenario 3: “I’ll deal with this later.”

Response:

“The earlier we start, the more control you have over how this unfolds.”

Scenario 4: “I’ll lose income.”

Response:

“We can design a structure that rewards you for transitioning relationships.”

Section 6: Escalation (When Needed)

If resistance continues:

☐ Reinforce firm expectations and policies
☐ Tie succession to compensation structures
☐ Involve firm leadership or managing partner
☐ Use data (client concentration risk, revenue exposure)

Last Resort:
Set firm-wide expectations—not optional participation

Section 7: Follow-Up Plan

☐ Document key discussion points
☐ Agree on next steps
☐ Schedule follow-up meeting (within 30–60 days)
☐ Monitor progress

Section 8: Quick Conversation Planner

Partner Name: ___________________________

Type of Resistance: ______________________

Key Concern(s):

My Objective for This Conversation:

First Step I Will Propose:

Follow-Up Date: ___________________________

Closing Thought

Succession conversations are not about ending a career - they're about protecting a legacy. These conversations can be more successful if the retiring partner has something to move forward to and not just looking behind at what they are leaving behind.

What's Fair?
Compensation Strategies for Today's Law Firm

LawPact Conference
Toronto, Canada

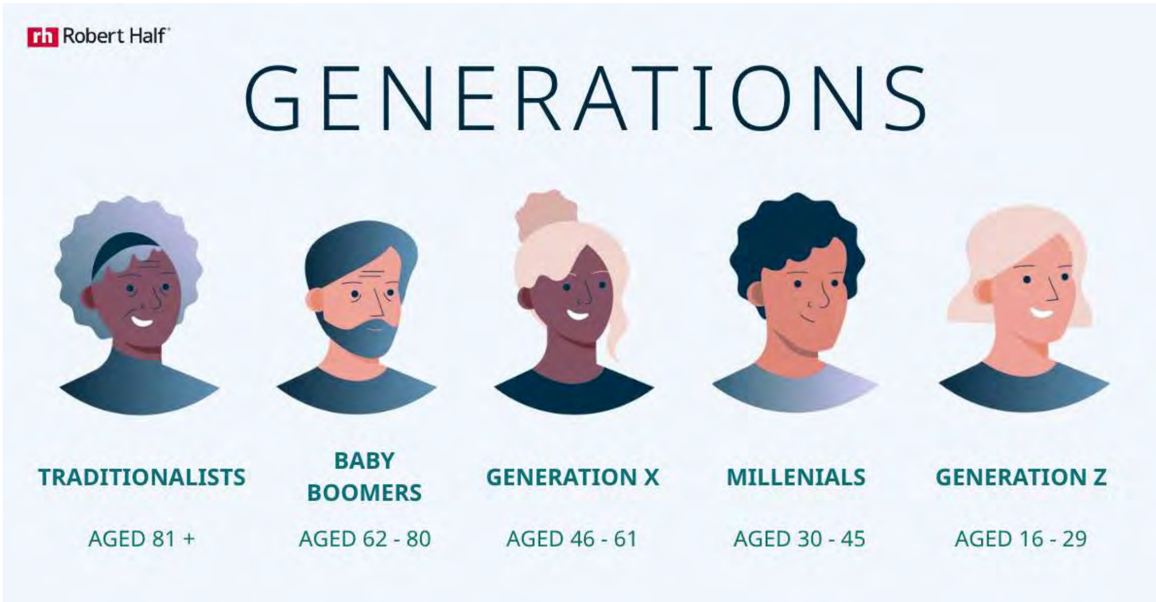
September 24-26, 2026
Camille Stell, Presenter

1

Learning Objectives

- Identify emerging compensation and benefits trends
- Identify behaviors driven by compensation systems
- Aligning compensation with performance, culture and firm strategy
- Explore ways to reward leadership, mentoring, and firm citizenship
- Assess strategies for greater transparency and fairness
- Align compensation with succession and partnership development

2



3

View of Work Rewards

Traditionalists / Silent Generation (1928–1945 – Ages 81-98)

- **Financial Safety Nets:** Because they witnessed severe economic hardship, their ultimate reward is job security and financial stability.
- **Traditional Benefits:** They value traditional benefits, such as company-backed defined-benefit pension plans, stable health insurance, and robust retirement packages..
- **Delayed Gratification:** They do not expect immediate payouts. They believe you put in hard work, show loyalty, and the system will take care of you.

4

View of Work Rewards

Baby Boomers (1946–1964 – Ages 62-80)

- **Traditional Rewards:** Value financial security, steady pay, stability, and promotions.
- **Recognition:** Appreciate tangible status symbols and formal, in-person recognition like plaques, titles, and corner offices.
- **Later Career:** Focus on healthcare benefits, stability, and passing down accumulated knowledge.

5

View of Work Rewards

Generation X (1965–1980 – Ages 46-61)

- **Autonomy:** View work as a pragmatic job rather than an identity. They value independence and self-reliance.
- **Work-Life Balance:** Prioritize flexible schedules, extra time off, and travel perks over corporate ladder-climbing.
- **Recognition:** Prefer private or small-group acknowledgments from leadership rather than public spectacles.

6

View of Work Rewards

Millennials (1981–2000 – Ages 30-45)

- **Purpose and Growth:** Seek professional development, transparent career paths, and corporate social responsibility.
- **Experiential Rewards:** Value volunteer time off, continuous learning, and mentorship opportunities.
- **Feedback:** Prefer regular, digital feedback and active coaching over annual performance reviews.

7

View of Work Rewards

Generation Z (2001–2020 – Ages 16-29)

- **Well-being:** Place a massive emphasis on mental health, compassion from leadership, and true work-life balance.
- **Values-Driven:** Look for rewards that support social causes, community volunteering, or charitable matching.
- **Connection:** Desire high-touch wellness support, mentorship, and a deep sense of belonging.

8

9

Compensation and Benefit Trends

Today's compensation conversations go beyond salary and billable hours. Lawyers increasingly expect compensation systems to reflect the full value they bring to the firm, while firms are rethinking how pay, benefits, flexibility, and recognition support recruitment, retention, culture, and long-term sustainability.

The shift adjusts from asking *"What revenue did this lawyer produce?"* to asking *"What does this lawyer contribute to the success of the firm?"*

10

Pay Transparency

Pay transparency is increasingly important to younger lawyers, who want to understand not only **what** they are paid, but **how and why** compensation decisions are made.

Clear criteria, consistent communication, and visibility into the factors that influence pay can build trust, reduce perceptions of favoritism, and help lawyers see a stronger connection between their contributions, career progression, and compensation.

11

Remote Work

For many lawyers, particularly younger lawyers, **where they work has become part of the compensation equation.** Flexibility, hybrid schedules, and remote-work options are often viewed as valuable benefits that can offset differences in salary or bonus opportunities. At the same time, many firms are pushing for more in-office presence to support collaboration, training, mentoring, culture, and client service.

The tension: firms may view office presence as essential to performance and development, while lawyers may view flexibility as an important component of their total compensation package.

A useful framing for firms is: **How much is flexibility worth - to the lawyer and to the firm?**

12

Non-Monetary Benefits

- Non-monetary benefits are increasingly valued by attorneys, 72% of attorneys under age 40 say work-life balance is a major driver for job change
- Compensation structures can include non-monetary perks like flexible work arrangements, student loan repayment plans, wellness programs, mental health support, and paid sabbaticals.

13

Professional Development in the Form of Micro-Learning

- Offering compensation in the form of continuing legal education (CLE) credits, leadership training, or attending conferences helps associates build skills while reinforcing the firm's commitment to their growth.
- However, younger lawyers are increasingly drawn to **short, focused learning opportunities** that fit into the flow of a busy workday such as podcasts, brief videos, quick-reference guides, short webinars, and on-demand modules. Micro-learning makes professional development more accessible, easier to retain, and more immediately applicable to real work.
- **The benefit to firms:** it creates more frequent opportunities for training, supports just-in-time learning, and can strengthen engagement without requiring lawyers to step away from client work for long periods.

14

Ensure Equity and Fairness

From "Black Box" to Fair Process

- Traditional compensation systems often operated as a black box - lawyers knew the outcome, but not necessarily how the decision was made. Today, firms are under increasing pressure to create systems that feel equitable, consistent, and explainable.
- **Fairness does not mean everyone is paid the same.** It means lawyers understand the criteria, believe those criteria are applied consistently, and can see how their performance and contributions connect to compensation decisions.
- **The shift:** from *"Trust us"* to *"Here's how the system works."*

15

Combatting Bias

- Compensation systems can unintentionally reinforce bias when decisions rely too heavily on discretion, visibility, or subjective judgments.
- Firms can reduce that risk by using clear criteria, consistent evaluation processes, documented decision-making, and regular review of compensation outcomes such as:
  - Implement checklists for comp committees.
  - Use third-party audits to uncover hidden biases and ensure fair, equitable decisions across the firm.
- Be intentional in providing education about hidden biases:
    - Prove it Again Bias
    - Maternal Wall Bias
    - Tall Poppy Syndrome
- Look at resources such as Bias Interrupters, Diversity Lab and the ABA Commission on Women in the Profession

16

Rewarding Non-Billable Contributions

Law firms should consider compensating not just for revenue producing work but also for contributions that support the firm's broader goals:

- Cultivate strong internal leaders by offering stipends, bonuses, or non-monetary recognition for serving in leadership roles both inside and outside the firm.
- To align compensation with Pro Bono work, firms can offer billable credit for pro bono hours, ensuring attorneys are not penalized for engaging in these efforts.

17

18

Aligning Culture and Compensation

- To align your firm's compensation plan with your law firm's goals, firms must adopt a holistic approach that rewards not just financial performance, but also contributions to firm culture, client development, and long-term sustainability.
- This requires a mix of base salary, performance-based bonuses, and non-monetary benefits, tailored to individual and firm-wide goals.
- Fairness, transparency, and flexibility are key in ensuring that compensation supports both the short-term success of attorneys and the long-term objectives of the firm.
- By aligning compensation with these factors, law firms can attract, motivate, and retain top talent in an increasingly competitive legal landscape.

19

Behaviors Reinforced by Outdated Comp Plan

- Origination Obsession - chasing credit harms collaboration
- Fear-Based Practice Building – anxiety limits innovation
- Turf Protection – silos reduce cross-selling
- Undervalued Teamwork – support roles often ignored

20

Case Study 1: The Origination Bottleneck

Firm Profile: Mid-sized firm (75 attorneys) with multiple practice groups.

Challenge: The firm's compensation system heavily rewarded origination credit. Partners guarded clients, avoided team involvement, and newer attorneys struggled to gain visibility or build books of business.

Impact:

- Decline in cross-selling opportunities
- Poor associate development and junior partner retention
- Client complaints about inconsistent service

21

Case Study 1: The Origination Bottleneck

Solution:

- Shared origination credit for collaboration, allowing up to three attorneys to receive a percentage based on their contribution.
- Created a relationship partner role that rewarded maintenance and expansion of key clients.
- They sunset origination fees with retiring lawyers and created firm credits rather than individual origination for institutional clients after a pre-determined time.

Result:

- More interdepartmental collaboration
- Associates received mentoring on business development
- Increase in client retention and satisfaction

22

Discussion

- How does your firm handle origination credit?
- Have you experimented with shared credit structures?
- What fears or resistance would you face if you proposed this?

23

Case Study 2: The Fear-Based Rainmaker

Firm Profile: Boutique litigation firm (25 attorneys)

Challenge:

- The firm relied on a single rainmaker for the majority of business. The compensation model rewarded individual performance and did not encourage succession or team planning.

Impact:

- Rainmaker became burned out
- No clear path for junior partners
- Risk of revenue collapse if rainmaker exited

24

Case Study 2: The Fear-Based Rainmaker

Solution:

The firm introduced a legacy multiplier — a bonus structure that rewarded senior lawyers for transitioning clients to others and coaching future leaders. Compensation review also began to factor in client transition metrics.

Result:

- Business continuity planning became a norm
- Junior lawyers grew confident in managing key clients
- The senior partner reduced hours while the firm retained revenue

25

Discussion

- Who holds the most client relationships in your firm?
- What incentives do you have for transitioning those relationships?
- Could a legacy-based bonus system work in your culture?

26

Case Study 3: The Underappreciated Team

Firm Profile: Full-service firm (100+ lawyers)

Challenge:

Attorneys carrying non-revenue roles (e.g., recruiting partners, diversity leadership, and other strategic roles) felt shortchanged from bonus pools because of lower billable hours. High-performers were unwilling to take on firm-wide leadership responsibilities.

Impact:

- Leadership burnout among a few partners
- Stalled progress on DEI and innovation initiatives
- Decline in morale and firm cohesion

27

Case Study 3: The Underappreciated Team

Solution:

The firm created a bonus scorecard and allocated firm citizenship points as part of its annual review process. These were awarded for leadership, mentoring, recruiting, and training, and contributed to bonus and promotion decisions.

Result:

- More equitable distribution of leadership roles
- Increased participation in firm initiatives
- Improved retention of top associates
- Culture moved towards goals stated in the firm’s strategic plan

28

Discussion

- What kinds of “invisible” work go unrewarded in your firm?
- How might you measure and recognize that work?
- Who would champion a system like this at your firm?

29

Case Study 4: Siloed Practice Groups

Firm Profile: Regional firm with strong niche practices

Challenge:

Each practice group operated independently, with separate financial targets and revenue reporting. Compensation tied to practice group performance.

Impact:

- No cross-practice referrals
- Missed opportunities for integrated client service
- Internal competition for firm resources

30

Case Study 4: Siloed Practice Groups

Solution:

The firm introduced a firmwide growth bonus pool funded by a percentage of all practice group revenues. Groups received part of the bonus based on joint client matters and firm-level profitability.

Result:

- Increased collaboration between groups (e.g., tax + real estate, labor + M&A)
- New cross-practice service packages
- Higher profitability from integrated services

31

Discussion

- Are your practice groups collaborating or competing?
- What incentive would motivate groups to work together?
- How could you measure meaningful collaboration across silos?

32

Case Study 5: Transparency Turnaround

Firm Profile: 40-attorney firm with a closed compensation committee and a black box compensation plan

Challenge:

Compensation decisions were made behind closed doors with minimal explanation. Perceptions of favoritism and inequity spread, especially among younger lawyers.

Impact:

- Distrust in leadership
- Rising attrition among diverse and high-potential talent
- Lack of motivation for mid-level lawyers

33

Case Study 5: Transparency Turnaround

Solution:

The firm created a clear, tiered compensation rubric outlining how performance metrics translated to pay bands. While still using discretion, the firm shared sample profiles for each tier, provided a clear path to partnership, and offered feedback sessions for clarity.

Result:

- Increased trust in the system
- Lawyers more willing to seek feedback and improve
- Associates understood the path forward reducing turnover and resulting in a more cohesive culture

34

Discussion

- How transparent is your compensation process—truly?
- What benefits or risks do you see in sharing more information?
- What would help your lawyers better understand how pay is determined?

35

36

Compensation Architecture

Why Compensation Drives Succession Success

- Incentivizes:
  - Transition planning
  - Mentorship
  - Client handoff

Align money with behavior and transition

37

Compensation Models

Associate Compensation Models
- Lockstep vs. merit-based
- Hybrid systems
- Incentives tied to development – associate scorecard

Partner Compensation Considerations
- Origination credit vs. team credit (sunset origination credit)
- Rewarding transition behavior
- Avoiding "hoarding"

38

Transitioning Retiring Partners

Focus on a firm plan - not individual plans

Buyout structures
  - Fixed vs. formula-based
- Phased retirement
- Of counsel roles

Common Compensation Pitfalls
- Overvaluing origination
- Lack of transparency
- No incentives for succession
- Lack of trust on the finances – consider third-party to assist – trusted mediator, firm's CPA, outsourced financial modeling, law firm valuation, succession consultant

39

Path to Partnership

40

Create a Clear Path to Partnership

- Partnership criteria must be written, specific, and transparent.
- Metrics to Consider: client origination, leadership roles, mentorship, firm citizenship.
- For example, the firm can add specific metrics such as practice group leadership as a formal partnership criteria.

41

Non-Equity vs. Equity Path

- Create a path for associates that includes advancement opportunities– junior associate, senior associate, managing associate, practice group manager
- Trend for firms of all sizes include a non-equity path following associate status as a training ground for future equity partner – 12 -24 months
- Include a variety of tracks for lawyers with different strengths and career goals.

42

Provide Training for Future Partners

- Associates want to understand the path forward to becoming an equity partner – provide transparency.
- Include business development, leadership training, and succession planning as required steps.
- Prepare them for the financial implications of becoming partner including what to expect to pay in to the firm as a capital contribution
- Promote growth mindset through investment in professional development or skills coaching.

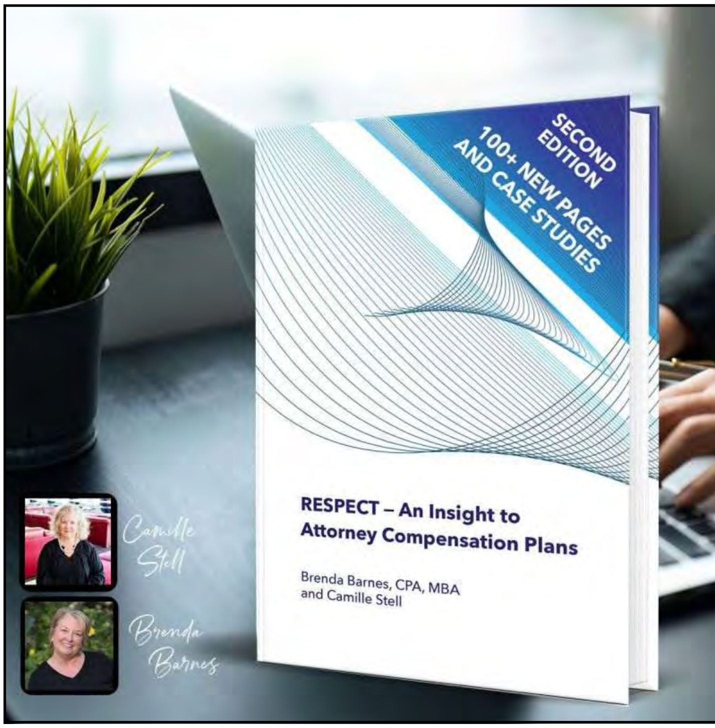
43

Conclusion

Compensation is the single most powerful tool law firms have to drive behavior and, ultimately, align individual lawyer performance with the firm's strategic goals.

Bruce MacEwen, The Elephant in the Room: Compensation" (2016, Adam Smith, Esq. blogpost

44



Order your copy today from:
www.lawofficemanagementbooks.com

Book Details

- Price - $189.00
- 300+ pages
- Topics include compensation for partners, associates, managing partners, compensation trends, biases, origination credit and more
- Checklists, case studies, interviews with law firms
- Print book or Kindle version available via Amazon

45

About Camille

- Fellow in the College of Law Practice Management
- Serves on the Advisory Board Legal Aid NC Innovation Lab
- Serves on the Advisory Group for Duke Law Tech Lab
- Serves on the NC Pro Bono Resource Center, Coordinators Network
- Served on the NC State Bar Regulatory Study Committee
- Frequent contributor to *NC Lawyers Weekly* and *Attorney at Work*
- Co-author, *Designing a Succession Plan for Your Law Practice: A Step-by-Step Guide for Preparing Your Firm for Maximum Value*, published February 2021
- Co-author, *Respect – An Insight to Attorney Compensation Plans*, 2nd Edition published October 2024
- Cornell University, Diversity & Inclusion Certificate, April 2021
- University of South Florida, Muma College of Business, Diversity, Equity & Inclusion in the Workplace Certificate, May 2021

46

Continue the Conversation

Camille Stell
Vice President of Risk & Practice Management
Lawyers Mutual Liability Insurance Co. of North Carolina
Follow and Connect at Camille Stell | LinkedIn

Camille@lawyersmutualnc.com
Toll free 800.662.8843, ext 133
Direct Dial 919.447.3354

47