



March 29, 2011


**The Evolution of Law Firms –
The Generation Gap**

Uniting lawyers from four distinctly different generations




The Club at Key Center
127 Public Square
Cleveland, Ohio 44114

Registration: 3:00 p.m.
Discussion: 3:30–5 p.m.
Reception: 6 p.m.

CLE: 1.5 hours approved



The Generations

Cleveland Key Center
 March 29, 2011
 Moderator
 Karen MacKay, MBA
 416.657.2997

PHOENIX LEGAL INC. One First Canadian Place, Suite 350, Toronto, Ontario M5X 1C1 416.407.6222 phoenixlegal.com

Agenda

- Meet Today's Panel
- Setting the Stage
- Values
- Recruitment & Reward
- Managing Work
- Developing Relationships & Business
- Leadership
- Closing Comments

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Meet Today's Panel

Traditionalists



Dan Balmert
Managing Partner
Akron office of
Vorys, Sater,
Seymour and Pease
LLP

Baby Boomers



David Goodman
Managing Partner
Cleveland office
Squire, Sanders &
Dempsey (US)
LLP

Generation X



Leigh Hellner
Partner
Cleveland office
Taft, Stettinius &
Hollister LLP

Generation Y



Kim Textoris
Associate
Cleveland office
Fay Sharpe LLP

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Agenda

Meet Today's Panel

Setting the Stage

Values

Recruitment & Reward

Managing Work

Developing Relationships & Business

Leadership

Closing Comments

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What is a Generation?

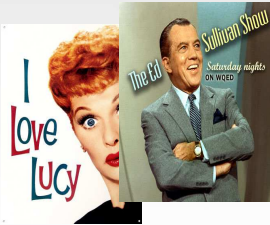
- Not bounded by periods of time
- Influenced by the events and conditions experienced while growing up
- Common experiences shape attitudes, values, traits, and behaviors



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Traditionalists – Key Shaping Events

- Born: 1928-1945
- Teenage years: 1942-1963
- Today (2011): 66+



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- First manned space flight
- Post-war economic boom
- Significant increase in economic prosperity
- Growth in white collar jobs
- Post-war immigration
- Post-war move from rural to urban
- Vinyl records

Baby Boomers – Key Shaping Events

- Born: 1946-1964
- Teenage years: 1960-1982
- Today (2011): 47-65



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- Civil Rights Movement
- Assassinations
- Vietnam War
- Lunar landing
- Woodstock
- Birth control
- Straks

Generation X – Key Shaping Events

- Born: 1965-1979
- Teenage years: 1980-1998
- Today (2011): 31-45

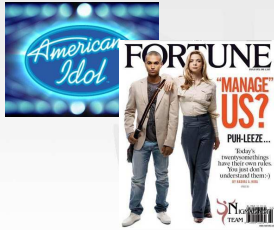


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- End of the Cold War
- Increased divorce rate
- Women in the workforce
- Increase in parents' unemployment
- Growth of the Internet
- Environmental deterioration
- Cassettes

Generation Y – Key Shaping Events

- Born: 1980-2000
- Teenage years: 1994-2018
- Today (2011): 11-31



- Terrorism
- School violence
- Global warming, natural disasters, AIDS
- Ubiquitous technology
- Bull market
- Working mothers
- Pro-child culture
- CDs, iPod

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Opening Remarks

- What do you want us to know about your generation?
- What are your perceptions of the other three generations represented on the panel?



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Values

- If there were three core values that reflect your generation what would they be?
- How does these values present in behavior?



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Values:

Citizenship & Community Service

- What does community service mean to you?
- How important is it to your work and your life?
- How are law firms supporting this core value?



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Recruitment & Work Life Balance

- There are between 16 and 25 million “freelancers” in the United States*
- More and more are lawyers finding work life balance and professional challenge
- How will the business model change to meet the work life balance needs of your generations?



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* Re-imagine, Tom Peters

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Recruitment & Career Paths

- A college graduate in 2005 will likely have 10 jobs in 5 industries over her career*
- Young lawyers change jobs several times before they settle.
- What is the impact of changing jobs at various stages of your career and points in your life?



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* Re-imagine, Tom Peters

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Reward

- The Boomers influenced compensation to reward hard work above all else.
- How might compensation systems evolve to meet the current and future needs of each generation?



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Collaboration & Knowledge Sharing

- We are told that Gen X and Gen Y are more collaborative than the generations before them.*
- How do changing work styles specifically impact how you practice?



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Working with Staff

- Staffing ratios have continuously dropped over the years*
- How does the panel view staffing needs currently and in the future?



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Building Relationships

- *Networking is a critical skill necessary to build a law practice.*
- How is networking uniquely different across the generations?



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Developing Business

Developing business is more critical today than ever.

What is the unique style that each generation brings to rainmaking?



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Leadership

- What particular skills and style do law firm leaders need to be effective with each of the generations in today's workforce?



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Closing Remarks

- Panel....

- What are your observations at the conclusion of this conversation and how have your perceptions changed?



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Thank you!



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The Great Divide

	Views on Leadership	Views on Authority	Views on Balance
Traditionalists	Hierarchy	Respectful	Don't get it
Boomers	Consensus	Love/Hate	Don't need it
Gen-X	Competence	Not intimidated Not impressed	Crave it
Gen-Y	Pulling Together	Polite	Insist on it

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The Great Divide

	Value from the firm	Work Ethic	Messages that Motivate
Traditionalists	Loyalty Stability Relationships	Dedicated	"It's valuable to hear what has and hasn't worked in the past."
Boomers	Profit Reputation Consensus	Driven	"You're valued here." "We need you." "You can make money here."
Gen-X	Resources Feedback Room for independence	Balanced	"Do it your way." "Not a lot of rules here." "We're not very corporate."
Gen-Y	Structure Supervision Clear strategy Competence	Determined	"You'll be working with other bright, creative people here." "You can be a hero."

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The Generations



Cleveland Key Center
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 Karen MacKay, MBA
 416.657.2997

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Karen MacKay, MBA, CHRP

Karen has more than 20 years of professional services experience combined with an MBA from the Rotman School of Management at the University of Toronto; a Certified Human Resources Professional and licenses in several tools and assessments. Today she has a number of loyal and

longstanding clients who have come to count on her for her knowledge and integrity, as well as for her sensitivity and flexibility in the face of their ever-changing business priorities. In 2009, Karen was elected to become a Fellow in the College of Law Practice Management in recognition of her contribution to the law practice management profession.

With excellent communication, presentation, facilitation and coaching skills, Karen's practice is focused on helping professional service firms execute strategy. She is focused on:

- Strategy and Planning
- Governance and Management
- Compensation
- Culture and Change
- Succession
- Outplacement and Coaching
- Professional Development and Competences

Further, Karen is a globally recognized expert on the challenges, expectations and motivations of the generations at work in law firms today; the management challenges around motivation, reward and retention of associates, of women and of partners nearing retirement.

Karen writes regularly for legal publications in Canada, the United States, the United Kingdom and Australia. She is a member of the Practice Management section of the American Bar Association and is a member of the Editorial Board of Law Practice Magazine, an ABA publication.

Prior to founding Phoenix Legal, Karen led the Canadian legal practice of one of the largest human capital management consulting firms in the world. Before that she spent eleven years as the Chief Operating Officer of a large Canadian law firm.

Karen can be reached by e-mail at kmackay@phoenix-legal.com or by telephone at 416.657.2997.



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The Evolution of Law Firms – The Generation Gap

Uniting lawyers from four distinctly different generations

Today's law firms are dealing with a changing legal landscape and an important element that cannot be overlooked is the generational divide. Our panel, F. Daniel Balmert (Vorys), David Goodman (Squire Sanders), Leigh Hellner (Taft) and Kimberly Textoris (Fay Sharpe) will present their perspectives of the generations in an active discussion moderated by Karen MacKay (Phoenix Legal). The Association of Legal Administrators (ALA) and Legal Marketing Association (LMA) have partnered resources to bring you this educational program along with The Cleveland Metropolitan Bar Association (CMBA). We are glad you joined us for what will be a great panel discussion.



Traditional
Traditional

F. Daniel Balmert is the managing partner of the Akron office of Vorys, Sater, Seymour and Pease LLP and practices in the areas of general litigation, product litigation, employment law, and workers' compensation. Dan received his B.A. from the University of Notre Dame in 1973, *cum laude* and his J.D. from Capital University Law School in 1976.



Baby Boomer
Baby Boomer

David S. Goodman is the managing partner of the Cleveland office of Squire, Sanders & Dempsey (US) LLP. His practice encompasses all types of public finance issues including acting as bond counsel in both general obligation financings and revenue bond issues and serving as underwriters' counsel for national and regional underwriters of bond issues by issuers at the state and local level. David received his B.A. from Oberlin College in 1974 and his J.D. from Harvard University in 1977.



GenX
GenX

Leigh Hellner is a partner in the Cleveland office of Taft, Stettinius & Hollister LLP and focuses her practice on commercial development and leasing transactions, representing private real estate companies and investors in a variety of matters, including managing and restructuring commercial holdings. Leigh received her B.A. from Northwestern University in 1993 and her J.D. from the University of Pennsylvania Law School in 1996.



GenY
GenY

Kimberly A. Textoris is an associate in the Cleveland office of Fay Sharpe LLP and focuses her practice on all phases of patent, trademark and copyright practice, with an emphasis on patent preparation and prosecution. Kimberly received her B.S. from Baldwin-Wallace College in 2005 and her J.D. from Case Western Reserve University in 2008.

Values
Values

Expectations
Expectations

Diversity
Diversity



Moderator
Moderator

Karen MacKay, is the President of Phoenix Legal, Karen has more than 20 years of professional services experience combined with a MBA from the Rotman School of Management at the University of Toronto. She is a recognized expert on the challenges, expectations and motivations of the generations at work in law firms today, the management challenges around motivation, reward and retention of associates, of women and of partners nearing retirement.

Overviews – Sponsoring Organizations

Cleveland Chapter – Association of Legal Administrators

The Cleveland Chapter has a long and rewarding history. In 1971, a group of nine administrators in the Cleveland area, led by Jack Kaufman of the firm formerly known as Burke, Haber & Berick, began meeting informally to discuss similar issues in the management of the law firm. At that time, the law office administrator was somewhat of a 'non-fitting' piece within the puzzle of the law firm, and these meetings afforded the administrators the opportunity to meet with others who held similar jobs. Jack Kaufman went on to become the 2nd President of the National ALA from 1975-1977. These meetings grew to a more formal structure and in 1972, H. Allan Newman of Calfee, Halter & Griswold LLP was elected the first president of the Cleveland Administrators Association. The group then decided to become affiliated with what was then the recently formed National Association of Legal Administrators and become one of the first charter chapters in the national organization -- chartered May 10, 1973. The Cleveland Chapter has been privileged to have exceptional leaders throughout its history. It is a very active Chapter and has had many members participate on National ALA Committees and serve in regional and national offices.



www.alacleveland.org

Ohio Chapter - Legal Marketing Association

For 25 years, the Legal Marketing Association has been the voice of both legal marketing professionals and attorneys looking to develop their practices. The association addresses the diverse and demanding needs of its members and their firms by providing a number of vital services, including:

- Continuing educational and professional development opportunities
- Forums for open exchange of ideas and knowledge
- Establishment of professional ethics and standards of conduct and performance
- Education to the legal community as well as other professionals about the important role of law firm marketing and business development in building and sustaining strong practices

The membership of the LMA Ohio Chapter includes marketing and administrative professionals and attorneys, from firms of all sizes, located throughout the entire state of Ohio. It's local programming, networking events, and other activities provide members the opportunity to learn about industry trends, attain knowledge that will assist them in their careers, and collaborate with their peers. In addition, the membership has a long tradition of organizing community outreach programs across the state, enriching the communities in which they live and work.



www.legalmarketing.org/ohio

Cleveland Metropolitan Bar Association

The Cleveland Metropolitan Bar Association (CMBA) is a nonprofit organization that operates as a center for legal professionalism in the region, promoting the highest ethical and professional standards. It was formed in March 2008 by the consolidation of the Cleveland Bar and Cuyahoga County Bar Associations, which brought together more than 135 years of rich history. It works to advance the greater Cleveland legal community as a world-class center of professional excellence and model of community service. The Cleveland Metropolitan Bar Foundation, the charitable arm and partner of the CMBA, raises funds to support the important public outreach activities of the Association. These activities include a variety of pro bono legal service, law-related education, tutoring and mentoring programs. Additionally, the Foundation assists with the Association's diversity initiatives aimed at improving the pipeline of minority students entering the legal profession. The CMBA's reach is primarily Cleveland and Cuyahoga County. This geographic footprint makes it the largest legal community in Ohio. It has an operating budget of approximately \$3 million and is home to nearly 6,000 members.



www.clemetrobar.org