



108 Management Development Solutions for Multiple-Location Departments

Gregory M. Allard
Vice President and General Attorney
Liberty Mutual Group

Arlene Zalayet
Regional Managing Attorney
Royal & Sun Alliance

Faculty Biographies

Gregory M. Allard

Gregory M. Allard is vice president and general attorney of the Liberty Mutual Group in Riverhead, NY. He oversees one of the largest in-house counsel operations in the United States, consisting of 70 offices with over 650 attorneys, who represent the Liberty Mutual Group and its policyholders in commercial and personal markets litigation in 29 states.

Mr. Allard has served as chair of ACCA's Insurance Staff Counsel Committee and is a member of the ABA, the Defense Research Institute, the International Association of Defense Counsel, and the New York Bar Association.

Mr. Allard received degrees from Seton Hall University and the University of Leicester (England), as well as his JD from St. John's University.

Arlene Zalayet

Arlene Zalayet is a regional managing attorney for Royal & Sun Alliance Insurance Company in Mineola, NY. She is also an adjunct professor of law at Touro Law School, where she has taught courses including New York practice, pre-litigation, and trial advocacy.

Miss Zalayet is a past president of the Nassau County Bar Association and the Long Island Trial Lawyers Association. She served as associate dean of the Nassau Academy of Law for several years. Additionally, she chairs the Continuing Legal Education Committee of the New York State Bar Association Trial Lawyer Section.

Miss Zalayet is a senior editor of the *Nassau Lawyer* and writes a featured monthly column on jury trials. She has lectured extensively on behalf of the Practising Law Institute, the ABA, the New York State Bar Association, and the Nassau Academy of Law. Miss Zalayet is an editor of two textbooks; *Civil Trials in New York* and *New York Examinations Before Trial and Other Disclosure Devices, 2nd Edition*.

Ms. Zalayet received a BA from St. John's University and JD from the University of Miami School of Law.

MANAGEMENT DEVELOPMENT SOLUTIONS

for MULTIPLE LOCATION LEGAL DEPARTMENTS

Prepared by:

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Vice President and General Attorney
Liberty Mutual Group

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Royal & Sun Alliance

AN OVERVIEW

Part One: Managing Multiple Locations

- 1) WHO? -Assuming you have formally designated a manager at the remote location, have you ALSO appointed a "Second" in the event that the primary is not available?

-More importantly, does the staff of that office *know of the Second's authority?*

- 2) WHAT? -Do all managers at the remote locations know *what* you expect to be communicated, and *how*, regarding both URGENT and ROUTINE MATTERS?

-Set specific expectations as to when an issue (read: "problem") needs to be brought to you.

-Until you have a comfort level with the manger, require a level of over-communication.

- 3) MAKING IT WORK:

-The **critical importance** of visits by upper level management to the remote location.

-Allows you to take the temperature of the office

-Shows the office you value their contribution

-Shows the people that you care

-Helps to overcome the single most difficult issue- making the remote location feel **connected** to you and to the corporation.

4) FORMAT OF VISITS: Formal and Informal

-Drop-in (Informal) visits are valuable, and easier to accomplish. They set a good tone and are helpful to senior management who may be unable to undertake a more formal or structured visit/inspection/audit of a location.

-**Formal** visits: Do your homework: plan, plan, plan...for those visits. Both you and the office derive so much more when the visit is **substantive**.

-*Understand as much as you can about the office before you go:*

- metrics: financials, billings
- attitude/morale/work ethic issues - turnover
- client relations concerns
- employee performance issues
- workloads/caseloads: are they level, expanding or contracting
- office budget: expenses & recoveries

-At the high end of the "**Formal**" process are the "Top to Bottom" inspections/audits of the remote location.

- A team reviews all aspects of the office: substantive and administrative. Most importantly, you will never truly understand the work-product of an office unless you (or the team) reviews, *thoroughly* reviews, a cross section of the work. **(Quite simply, this means that the team needs to painstakingly look at a representative cross selection of legal files, from cover to cover!!)**

- Depending upon your corporate structure, the team should be composed of at least one or two managers from other locations; this is a powerful method, and since all managers participate in the process eventually, they are NOT threatened; the overwhelming benefit is in the cross-pollination of ideas among managers. (...I never thought of doing it that way...)

5) IT'S THE PEOPLE.

-Every location which functions well, **INVARIABLY** has a good manager. There is a direct link. **Period.**

-So: Pick the best managers, and have them recruit and hire the very best people.

*** Your remote location will never function well with a marginally functioning manager. Once you appoint them, train them, and train them well. (See next section.)

-When you visit an office, make your best effort to meet with every employee. Spend some time with them individually. If this is not possible, at least hold an office-wide meeting, where you sit down with the office as a group. Let them hear from you and see you.

-When meeting with individual employees, **ask every employee the One Question which will produce more information about the office than you could ever imagine.** (We will discuss this question during the presentation.)

6) IT'S YOU!

-You **MUST, MUST, MUST DELIVER CLEAR EXPECTATIONS** to all Managers; this is even more critical when it involves managers in remote locations.

- What do you expect of the remote manager:

-Substantively: Quality of the work, productivity; billings, caseloads, client relations.

-Clear goals. Reachable targets. Objective objectives.

-Do your managers understand what their clients need and want?

-Do your managers actually meet - face to face- with their clients?

7) SOME OTHER TECHNIQUES:

-Conference calls: regularly (every month!) with main office or regional management.

-Create server or common location for submission by the participants of agenda items;

-Allow participants to view the entire agenda as it is being assembled.

-Establish a "Hotline" for Ethics questions; appoint an Ethics Advisory Team, comprised of people from your field locations.

-Video conferencing.

PART TWO: Management Training and Development

1) INITIAL SELECTION OF MANAGERS

-Not surprisingly, the best lawyers don't always make the best managers.

-People skills and good judgment are most important traits.

-If you appoint a weak manager, your remote office will be weak.
Guaranteed.

-Don't settle for second best.

-Selection of a good *remote* manager is more important than picking one with whom you will work with (and see) daily.

2) SUCCESSION PLANS

-Do you have one? If not, you need one tomorrow.

-If one of your managers resigns, do you have someone ready to step in at the remote location? This is especially of concern where there are lawyer-licensing issues.

-Once a year have each field level manager submit non-binding recommendations of persons who have potential (with training), or, are currently ready to fill management positions as they open.

-From that list, or your own list, assign potential managers to ***special projects of limited duration***. Try them out. See how they handle a higher level of responsibility.

-Form a "Task Force" where needed; a sub-group to address and report back on a specific issue; or a specialized team to handle one high-maintenance client or account. Assign them to office review/audit/inspection teams.

-Use a mentor/coach system on new or potential managers. Arrange for the newly appointed manager to work, side by side, for several days, with a seasoned person.

3) DEVELOP INTERNAL MANAGEMENT TRAINING PROGRAMS

- Training component must include Performance Management of a manager's employees.

- What is acceptable in terms of appraisals?

- What are the department's expectations as to performance ratings of employees?

- HR functions? Centrally or locally handled? Has your policy been clearly communicated?
- What are the expectations regarding probations, warnings and other job actions? Are they reviewed at a higher level?

(A real-life example of the need for training: One potential manager, when asked what he would do after terminating someone for poor performance, responded - with all the best intentions - that he would hold an office meeting and inform everyone of the reason why the person was terminated, and thereby encourage greater performance from the remaining staff. Clearly this person needed *some* training before assuming an actual management role.)

- From a Legal Management perspective, there is no course, no material and no training on the market which is suitable for management development of a multiple legal department operation. Craft your own, even if it is small scale.

(Design of such a program will be discussed during the presentation.)