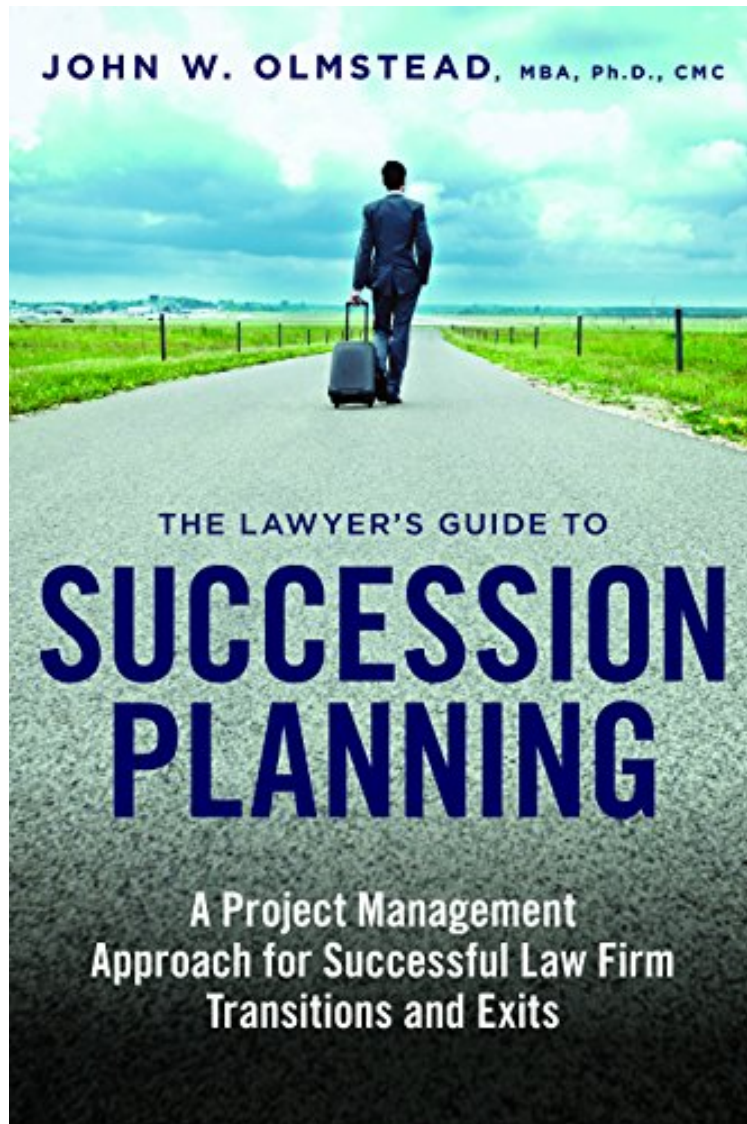


(Ebook pdf) The Lawyer's Guide to Succession Planning: A Project Management Approach for Successful Law Firm Transitions and Exits

The Lawyer's Guide to Succession Planning: A Project Management Approach for Successful Law Firm Transitions and Exits

John W Olmstead

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Law Firm Transitions and Exits:

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Sixty-five percent of law firms' equity partners in the U.S. are in their late 50s or early 60s. Over the next ten years, there will be many partners in firms of all sizes transitioning and exiting their practices. Many solo and sole owner attorneys as well as larger law firms are in "reactionary mode" and have not adequately prepared for transition of firm leadership and client relationships. A firm's very survival may very well depend upon coming to terms with succession and transition and doing so early. The purpose of this book is to provide guidance to firms of all sizes, especially smaller firms and share succession and transition processes, approaches, and step by step action plans for solo practitioners, sole owners and members of larger law firms. The book discusses what to do and what not to do, how to do it and provides case studies, sample action plans, sample succession plans, sample agreements and other documents.

About the AuthorJohn W. Olmstead, MBA, Ph.D, CMC is a Certified Management Consultant and president of Olmstead Associates, Legal Management Consultants, and Life On Balance. Both firms are based in St. Louis, Missouri.Olmstead Associates is a practice management, marketing, and technology consulting firm that works with law and other professional service firms ranging in size from 100+ professionals to firms with solo practitioners. The firm, founded in 1984 serves clients across the United States assisting them with implementing change and improving operational and financial performance, management, leadership, client development and marketing.Dr. Olmstead has over 41 years of experience working with law and other professional service firms. His assignments have ranged from marketing and strategic planning to other legal management engagements such as organizational change, firm governance, implementation of technology, financial management, staff development, partner compensation, and practice management. Dr. Olmstead has helped clients implement client service improvement programs consisting of client satisfaction surveys, program development, and training and coaching programs. He has been a lecturer for the Association of Legal Administrators, Missouri Bar Association, Missouri Trial Attorneys, St. Louis Metropolitan Bar Association, The Women's Bar Association of Illinois (Chicago), IBM, Illinois State University, Illinois State Bar Association, Solo-Map CPA Association of St. Louis and many other national, state and local bar and other professional associations. Dr. Olmstead has authored numerous articles on law office management in local, regional, and national law office management publications. He is currently serving as Editor-In-Chief, West Group, The Lawyers Competitive Edge: The Journal of Law Office Economics and Management.Dr. John Olmstead has a MBA in accounting/finance and marketing as well as a Ph.D in Business in Organizational Psychology. His doctoral dissertation An Exploratory Approach for Addressing Leadership Characteristics in Law Firms Using the Case of a Voluntary Bar Association, introduced an approach for addressing leadership interpersonal characteristics and interpersonal preferences for leadership roles. Dr. Olmstead is an associate member of the American and Illinois State Bar Associations, a member of the Institute of Management Consultants, and the Association of MBA Executives. He served as past Chair and is currently serving as a member of the Illinois State Bar Association Standing Committee on Law Office Management and Economics and as Past President of the Institute of Management Consultants St. Louis Chapter. Dr. Olmstead may be contacted via e-mail at: johnmstead@olmsteadassoc.com.