



Freedman Consulting, Inc.

— CHANGE . . . RESULTS . . . SUCCESS —

OUR LIFE IN FLUX

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Over the past few months, it seems the majority of calls to the PBA Law Practice Management hotline were about dealing with change. Of course, that's a given in that we're constantly dealing with change. So much so that I wrote an article a few years back titled "The Only Constant Is Change."

Change is not something that sits well with most attorneys. You have likely heard someone refer to your colleagues in general as predominately change-averse. Yep, there's that lawyer DNA popping up again.

In my seminar "Succession Planning for Business Strategic and Emergency Surrogacy Purposes," a slide includes some introductory conclusions from the Altman Weil 2020 Law Firms in Transition Survey:

What we've documented . . . is that law firms — by nature, design and temperament — are slow-moving organizations

Most law firm partnerships don't want to change, aren't good at it, and by and large don't think it's necessary

Were it not for the introduction of usable AI in law firm life, we would probably be dealing with only those changes foisted upon us, and then,

only when we had no choice. The fact that so many lawyers are proactively and strategically addressing AI use is a significant departure from normal.

To give you an idea of the types of changes I've been providing guidance about, they include:

- Retirement planning unique to each caller's desired outcomes including any combination of sale, succession / transition, closing and perhaps continuing on in an Of Counsel or Advisory capacity;
- Succession planning for continuation of the firm in some manner, and perhaps salvage of some sweat equity;
- Changing current employment, perhaps to establish a solo or small practice, or take a key position to build a practice at a new firm, or maybe transition to public service, in-house or elevation to the bench;
- Taking the firm's technology infrastructure to a new level, in some cases introducing AI or practice management software (LPM) for the first time, transitioning to a cloud-based infrastructure, auditing and upgrading hardware, software and policies related to secure computing;
- Dealing with staffing changes caused by unexpected departures or deaths. Like the paralegal, legal assistant or office manager who has been with you for the past xx years and is the "best x you ever had!" Or your lifelong firm partners – one announcing their intention to retire at the end of 2026 (thanks for all the notice!) and the other who just got a bad diagnosis and will be forced to retire imminently. So, all of a sudden, you're faced with coming into an office with no one left to talk to or help shoulder the demands of the practice.

These and more. Of course, my absolute favorite call was the last week of August. "Ellen, I have decided to retire on my birthday in November 2026. I think I want to sell my practice, rather than to close it." Sure, let me just cross my arms, twitch my nose, and Genie Ellen will grant your wish.

One thing you may have noticed is that a lot of the changes I help people with are predictable. And here's the first thing people learn: Most of the time it takes a lot longer to achieve desired results than one anticipates. Here's the second thing people learn: The devil is in the details, and the sooner one starts planning, the greater the likelihood of getting the desired results.

There's a lot of prep work that is not disruptive that can be started in the normal course of business in advance of many of these changes, that are not disruptive. For example, starting to measure and maintain metrics on certain aspects of your firm. Enhancing your records management and retention procedures, rather than just dealing with a big mess when you want to close down or sell your practice. Investing a small amount of time consistently over a long period of time to keep the volume of calls and revenues from disappearing before you're ready to pack it in. Even something as simple as establishing procedures to keep your contact lists current.

So let me share a little secret. My last two articles in the *Pennsylvania Bar News* weren't so much about providing information on particular management issues. They were disguised calls to action. I wanted members who have been kicking various cans down the road repeatedly — ignoring inevitable changes until some cosmic gong tolled to indicate the can finally hit the wall — to get in touch to finally talk about it.

Until you actually contact me, I can't help. Here's the thing. Remember when you realized that had you started saving a miniscule amount of money from your paycheck way back when, you would be able to retire early? Are you going to be one of those with regret about what a difference it makes when approaching retirement having *not* done that?

I know that on many levels I'm tilting at windmills. Trying to push and pull each and every one of you to be more proactive about your future. To acknowledge that change is inevitable, and maybe there are some things you can do now that will make it easier in the future. In fact, I'm willing to bet that there are simple things you can do now to make your future easier, *and* provide some immediate benefits, too.

Take a chance. Press that call-to-action button. Just like the dozen or so members who contacted the LPM Hotline for the very first time, in response to my last two articles. Consistent emotional reactions include relief and amazement at what gets accomplished. The most consistent comment included in the "thank you" and "we'll talk again" closings is a confession that it feels good to have a clear action plan and identified strategies to address upcoming changes.

We all know that not all change is welcome. Not all change can provide a feel-good conclusion. But even when things go cattywampus, getting clear guidance, and genuine support, can make all the difference.

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