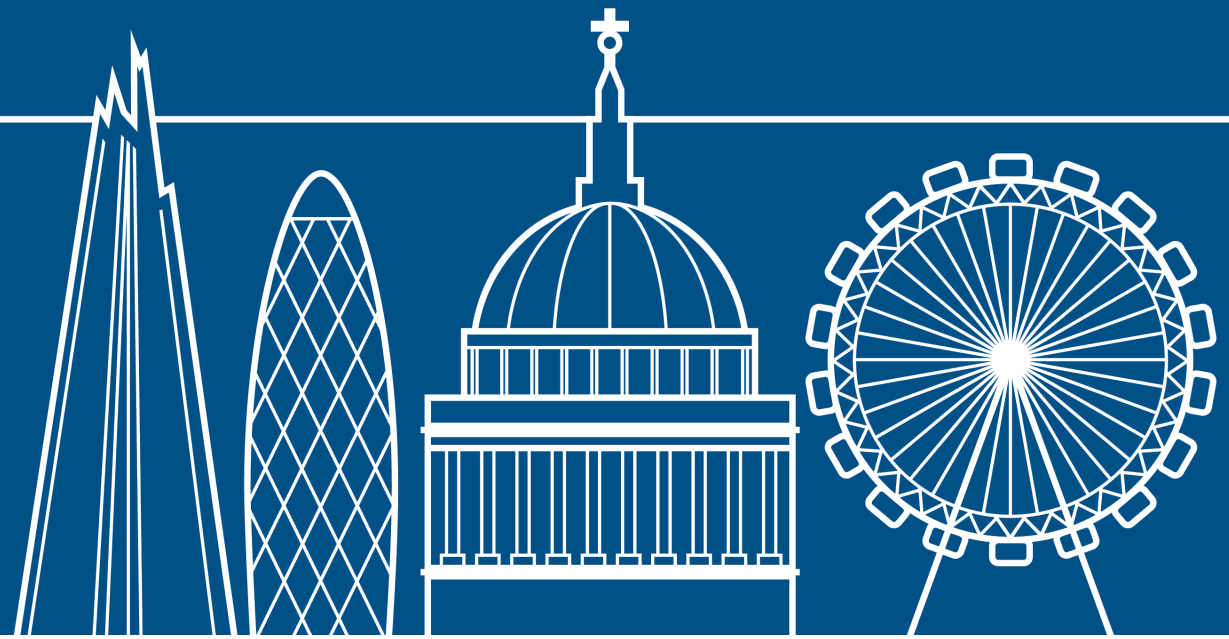




FICPI ExCo & 21st Open Forum

London, 1-7 October 2023



Leadership and Organisation or 'Management 101: Taking command of your IP firm'

STRENGTHENING THE PRACTICE OF THE INDEPENDENT IP ATTORNEY

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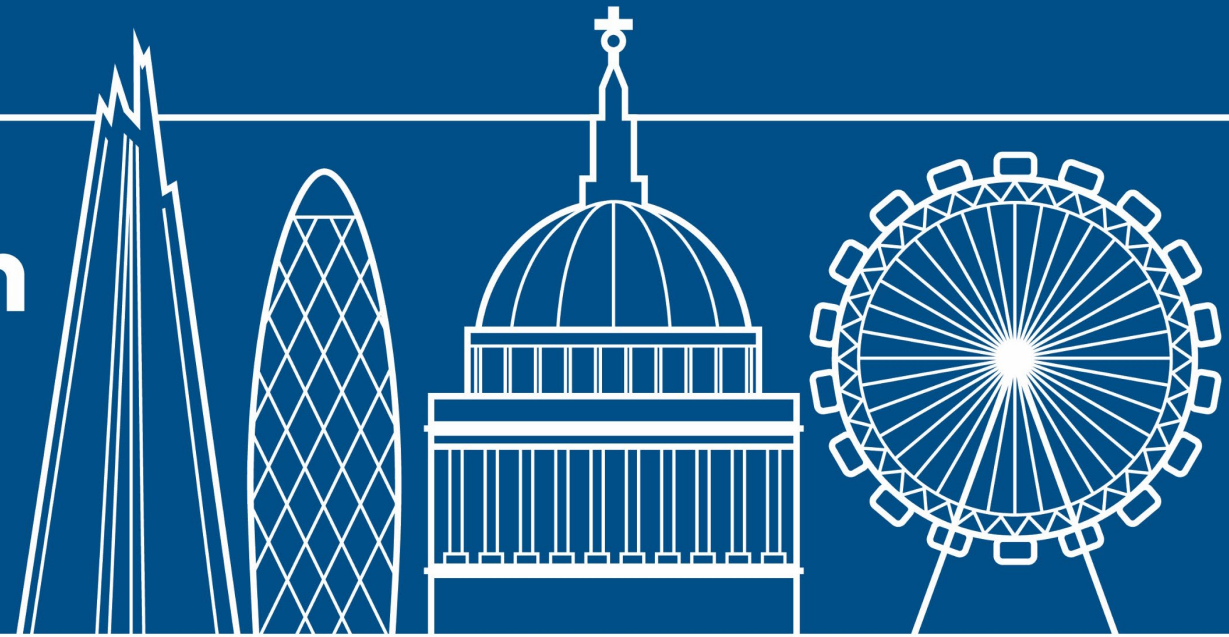
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Introduction

Christoph Vaagt

Managing Partner, Law Firm Change Consultants, Germany



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Christoph H. Vaagt



Micheline K. Johnson



Ivan Ahlert



Bryan Gallo



Introduction

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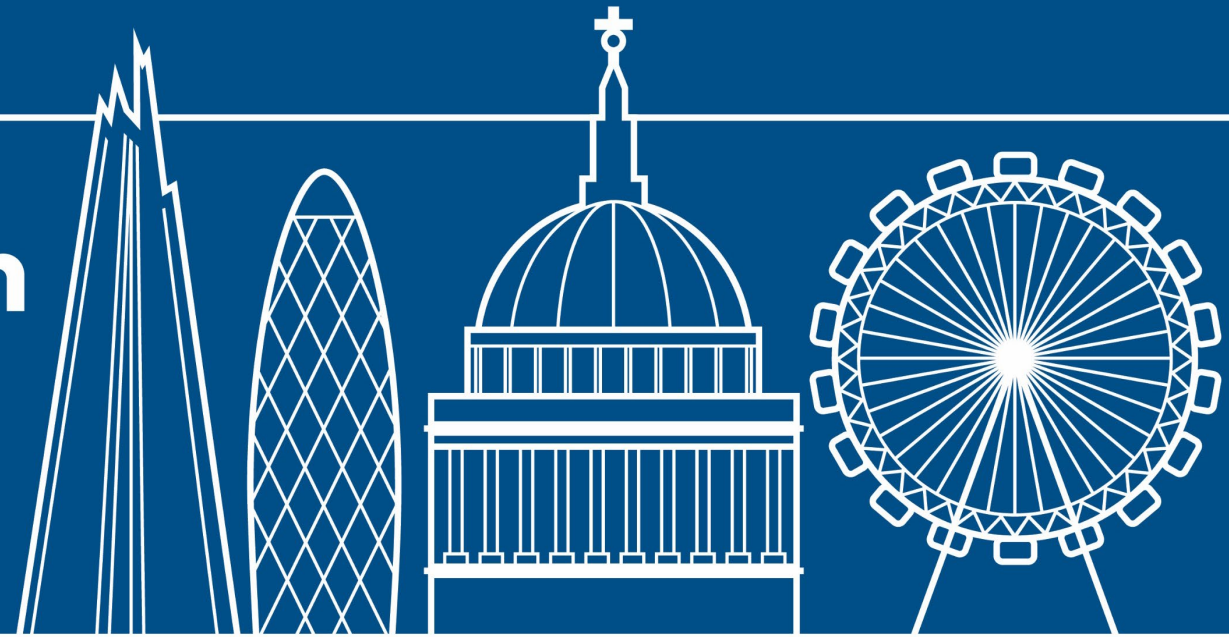
- Management is increasingly crucial in the competition: **decision making structures and processes** are the most important part of this process in partnership settings
- Effective management is about **managing people against numbers (KPIs)**: economic output is increasingly important in the competition for talent and to be able to invest
- **Process management/streamlining and modern IP law firm software** are key to have operational effectiveness: this is a challenge for law firm organisations
- Skills of people are key: investment in skills, in particular **project management and people skills** are key for resilient organisations
- All this points to the fact that **Change management** abilities in law firm management is becoming a key skill for law firm leadership; this is contradicted by the “political nature of being elected by its peers”; this is the biggest systemic challenge for law firms



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Management of the very large firm

Micheline K. Johnson
Taylor English, USA





Taylor English Duma LLP (“TED”)

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- TED delivers excellent lawyers, high efficiency, and cost certainty so as to align with client business needs. Resources are focused on client work, not corporate overhead.
- 160 Attorneys
- 119 Partners
- 5 Equity Partners
- 23 Offices in 15 States
- Decision-Making Powers
 - Entire Partnership
 - Dedicated Sub-Committees
 - Managing Partner
- Processes and Standards
 - How well respected?
 - Motivation for compliance
 - Enforcement measures



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Management of the very large firm

Ivan Ahlert

Partner, Dannemann Siemsen, Brazil



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Dannemann Siemsen

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- **Dannemann Siemsen** has been operating for 123 years and is the largest IP firm in Latin America. In 2022 alone, we had more than 5,000 patent filings. Our primary focus is on IP, but we also provide comprehensive legal services in corporate, business, tax, consumer and environmental law, data protection, and more.
- **Staff & Partners:**
- **Total Staff: 850**
 - Intellectual Property: 500
 - Legal Services: 350
- **Partners:**
 - IP Agency: 30 income partners, 41 patent attorneys (12 senior, 29 junior), 20 trademark attorneys (13 senior, 7 junior)
 - Legal Services: 10 income partners
- **Board:** Consists of 8 equity partners, and I currently serve as the President.



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Management of a mid size firm

Bryan Gallo

Partner, Pearne & Gordon, USA



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Pearne & Gordon – Management Structure

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23 Attorneys

- 19 total Partners
- 14 Partners are owners with voting rights for firm management issues
- Each Partner is responsible for their own book of business and client debt

Firm Management Committee

- 5 Partners (owners), elected annually
- Meets monthly to handle day-to-day operations
- Sets agenda for Partnership Meetings
- *Cannot* do the following:
 - Annual raises / partnership compensation
 - Termination of staff
 - New expenditures in excess of \$25,000
 - Litigation on behalf of the firm

Majority vote at Partnership meetings

- Meetings quarterly (sometimes monthly)
- Annual full day meeting for firm-wide strategic initiatives
- Any Partner may raise an item for discussion
- Items are discussed and then voted on, most items require only a majority vote to pass
- Various Partners are responsible for overseeing and management of major departments (accounting, docketing, IT)



Questions for the audience

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Please, sit together in small groups of 3-5 and discuss:

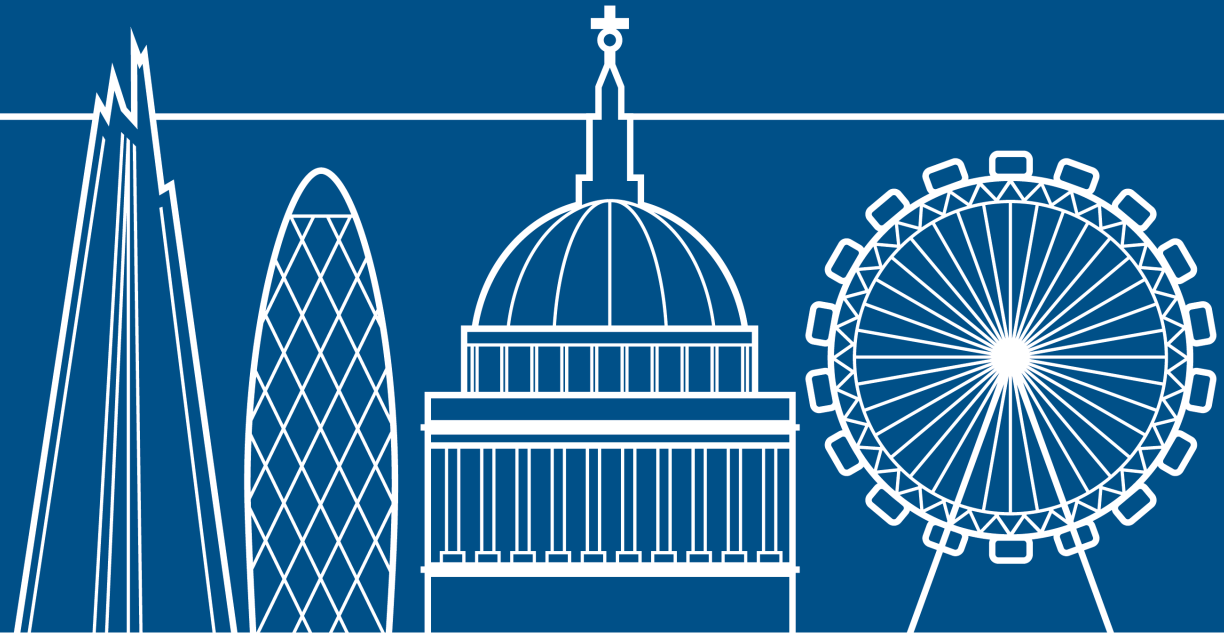
1. How have we organised ourselves internally in terms of decision-making powers; What is our next step?
2. On a scale of 1-10, how well respected are our processes and standards? (1: very little; 10: nearly perfect)
3. What is our main challenge at home which I take from this lesson?

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