

Firm Leadership Begins With Being a Good Lawyer, Seizing Opportunities

The desire to be a law firm leader goes back — way back — for many attorneys.

During a recent meeting of the PBA Large Law Firm Committee, there was a discussion of how many women have become managing partners at large law firms across the commonwealth. Kathleen D. Wilkinson, PBA past president and partner at Wilson Elser Moskowitz Edelman & Dicker LLP, Philadelphia, suggested that the committee sponsor a program with women managing partners.

Danielle Banks, partner at Stradley, Ronon, Stevens and Young, Philadelphia, immediately volunteered to put a Pennsylvania Bar Institute webinar program together,

which was co-sponsored by the PBA Commission on Women in the Profession. In late October, Wilkinson and Banks co-moderated and participated in a 90-minute discussion with five women managing partners on a variety of issues, titled “Women in Leadership in the Legal Profession.”

The program began with Wilkinson’s question: How does one become a leader? She asked the panelists to tell their story.

“I always knew I wanted to be a leader, because we wouldn’t be here if we weren’t overachievers,” said Brigid Q. Alford, Marshall Dennehey PC, Harrisburg.

“Leadership starts with being a truly outstanding lawyer, development of your skills, delivery of



Kathleen D. Wilkinson



Danielle Banks



Brigid Q. Alford

exceptional client services and the development of a practice,” said Jami Wintz McKeon, chair, Morgan Lewis & Bockius LLP, Philadelphia. “Being a respected member of your organization is job No. 1. A lot of things flow from that, when people have the opportunity to see you as a terrific whatever it is you are. In my case it was trial lawyer. But whatever kind of law you practice, your first and most important job if you ever aspire to leadership is being outstanding at what you do.”

Seizing Opportunities

Panelists agreed that seizing opportunities when they present themselves is key.

“I didn’t know what opportunities were here for me,” Alford said. “I was with a small, local firm here in Harrisburg for the first 25 years of my career. It was almost happenstance when you run into somebody who’s with another firm, and you get to talking and then, all of a sudden, the offer is extended, and there you go.”

A leadership opportunity can arrive through various routes and means.

“Sometimes the path to leadership

is not a straight line,” said Lauren P. McKenna, Fox Rothschild LLP, Philadelphia. “You can start as being a wonderful lawyer, and that is sort of the foundation for what you want to do. In my case, I had three children along the way. I worked to reduce my schedule while I was a younger mother, and that was important to me at the time in terms of how I managed practicing law and having a family. That might have been viewed as a little twist in a turn, but I was better for it. I learned how to navigate things. I learned how to balance. I was working hybrid before we had hybrid, because I was working a reduced schedule.”

Wilkinson also asked about the balance of leadership with family and other obligations. During the interactive program, someone from the webinar audience expressed her thanks to the panel for talking about coming up through the ranks in a nontraditional way, Wilkinson said.

“This person has two young children and her own practice, who transitioned to contract lawyer status during grad school and into the high school years

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for her children,” Wilkinson said. “Then she became a full-time employee income partner, then equity partner and now is on the management committee. She’s very happy about the discussion about sensitivity, to people of all genders and backgrounds, whose career may not have gone in a straight-line manner.”

“The opportunities that were pre-

sented came very early on,” Alford said. “I embraced those, not necessarily looking for them initially, while overseeing a small group of associates in my area, in my practice group. Then I assumed a larger workload, unfortunately a significant workload, and oversight of many new files and new and other attorneys, when one of our shareholders died very unexpectedly. I was presented the opportunities which you accept to present in-firm, in-house seminars to younger attorneys, not just women attorneys, but attorneys’ attorneys.”

McKenna said that if you start with those foundational elements, “being a really good lawyer and then look for opportunities to never say no, I think it follows.”

However, some attorneys experienced some pushback, or at least some resistance, at first.

“I’ve been at Morgan Lewis my whole career,” McKeon said. “I was very young and inexperienced when I started, and I think I’ve benefited a bit from the fact that it was still relatively new at large law firms, having women who were there. I had people tell me I should never go to a big law firm be-



Jami Wintz McKeon



Lauren P. McKenna



Amy J. Coles

cause I wouldn’t succeed as a woman. But at Morgan Lewis, I think people recognize the value of having diverse voices in the room. So, at a pretty early stage, I got the opportunity to serve on a lot of different committees, and some of them weren’t very important. But I’m a big believer that you should always say yes, whether it’s the cafeteria committee or something else, because you learn something from every role and, more importantly, people have a chance to see your leadership skills.”

McKeon helped manage her Philadelphia litigation practice and then ultimately ended up as head of its litigation practice, the firm’s largest practice group worldwide.

Creating a Leader

Wilkinson also asked: what makes a leader? Can you be born or brought up with those traits?

“(In my immediate family), I’m the oldest of five,” said Amy J. Coles, Blank Rome LLP, Pittsburgh. “I was always called ‘bossy.’ I think that is an unfair word to use for people. I’m the mother of a 9-year-old little girl, and when people say that she’s bossy,

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Court Summaries

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erred by refusing to define whether it is medicine or supply. Since claimant is not health care provider, Section 306(f.1)(5) of the act and 34 Pa.Code 127.201 do not apply to him; and he is not required to submit Healthcare Finance Administration forms for periodic medical reports to receive reimbursement from employer, but only needs to submit doctor prescription for CBD oil to treat pain caused by work injury and receipts therefrom.

LATENT OCCUPATIONAL DISEASE — asbestosis — subject matter jurisdiction — Section 303 — Occupational Disease Act — 77 P.S. 1403 — appellate jurisdiction in Commonwealth Court — savings clause — retirement before diagnosis — no effect on earning power — act inapplicable — EXCLUSIVITY PROVISIONS DO NOT APPLY — order denying motion to dismiss affirmed

McHenry v. Goodyear Tire & Rubber, No. 373 C.D. 2022 (Nov. 14, 2023) — Claimant who suffers from asbestosis, which was diagnosed after he retired, suffers from medical disability which has no effect on earning power, hence is not entitled to benefits under the Occupational Disease Act. Since the occupational disease is not compensable, the exclusivity provisions of the Occupational Disease Act do not apply. ⚖️

Culture Drives the Firm

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In my experience, when firms don’t ask for an estimate, the work proceeds. I have never had a firm later regret the decision to invest in their improvement. There are always eye-opening revelations. Lots of little incremental improvements can lead to big improvements in firm culture and a healthier bottom line.

Ironically, usually when firms ask for a detailed estimate, they rarely proceed with an evaluation. There are always people who will object to spending any amount of money targeted at telling them what they’re doing wrong. The loudest objectors will be those who

know deep inside that they are best served by avoiding the spotlight by keeping certain practices from being examined too closely.

Whether you’re thinking about merging, changing firms, going out on your own or just improving your firm, I highly recommend examining and understanding the role of firm culture. It is a driving force that often impacts actions, decisions and emotions in an unseen fashion. Don’t let yourself be chauffeured about without paying attention. Get into the driver’s seat!

Share your reactions or comments to this column with Ellen Freedman at lawpractice@pabar.org. ⚖️

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because she's a lot like her mom, I say, 'No, she's a leader.'"

Coles said some things may be innate, "but you are constantly learning and honing those skills. So for me, the one that I've been working on is active listening — people have to feel heard. We all must work really hard on not interrupting, not telling someone what to do, and just listening. When someone wants guidance, I am happy to give it. I can jump into that leadership role in a second, but I continue to work on active listening. I think it's really important in the service we provide to our clients, bringing up others and training future leaders.

"The other piece of advice came from a friend, former Pennsylvania Supreme Court Justice Cynthia A. Baldwin," Coles said. "I knew I had it in me, I was doing excellent work, I was already a partner, but I didn't

know if I wanted a leadership role. Cynthia said, 'Set your priorities, and be excellent at whatever you set those priorities to be, but change them.' They don't have to be the same three priorities for your entire career. For me, I took that to heart and I encourage others to do that, sometimes, depending on where you are in life."

Be patient and willing to pivot.

"If you're new to this, really build your practice," said Patricia B. Santelle, chair emeritus, White and Williams LLP, Philadelphia, and PBA Large Law Firm Committee co-chair. "Build your brand. Show up. I always showed up for events when I was an associate at White and Williams and a young partner and, of course, be yourself. I know it's easier said than done. The skills that make someone a good leader — being engaged, prepared, collaborative, passionate and empathetic — were things that just came naturally to me, but they are really the pillars of strength. But you have to be patient."

Santelle warned not to expect things to just come your way because you're excelling in your practice.

"You really have to observe the people around you," Santelle said. "Why are some people in leadership positions? Talk to people, get advice, don't just sit back and expect it to happen. If you want things to happen, you have to move them along."

Self-promotion is critical.

"When you do good work, when you get a compliment from a client, share that, run that up the ladder," Alford said. "Otherwise, nobody's going to know. Maybe there is a societal hesitation because then that means I'm bragging, I'm cocky. Too bad! You did good work, and your peers need to know that, but more importantly, the folks above you need to know that, if you are interested in moving up the leadership ladder. I promote self-promotion among the associates and then show them how to do that."

Another method is to lean on a colleague or a best friend.

"I rely very heavily on what I call my work best friend," Coles said. "A

work best friend is a secret power. It's the greatest thing you can have. It's what keeps me engaged. It's what gives me my sanity check. Most of all, when you don't want to promote yourself, that person, whoever it is, a partner, a friend, someone who's with you, can promote you. So if it doesn't feel natural to promote yourself, let someone else do it, and make sure you're a good promoter for your friends, colleagues and others who deserve the recognition."

Alternatives to Self-Promotion

"It's really important as a leader to create an environment where everybody tells others about the good work of others," McKeon said. "In our partnership questionnaire every year, we don't allow people to submit memos about themselves. But we have a 13-question questionnaire, all of which, except for one question, asks about what you've seen others do. Talk to us about who's helped your practice. Talk to us about who you've seen live the culture of the firm. Talk to us about who you've seen exemplify our commitment to diversity, equity and inclusion. If you create a culture where people are actually rewarded for celebrating other people, then you don't have to have people who are running around promoting themselves. I do think it's a little bit risky to be an aggressive self-promoter, because unless you're very good at it, it can be a negative. But if you create a culture where people understand that it's a good thing to talk about what your colleagues are doing, and share that information, you don't have to and it always flows upstream. I tell our people from the day they walk in the door, part of their job is to tell us when they see other people succeeding. I think that's a really important thing as a leader to try to cultivate."

McKeon remembers when her firm developed something called an "Advisory Board," she said, "which is essentially our board of governors, whose role is to advise the chair. In 1999, it started with 15 lawyers for staggered three-year terms, and I was

selected to be one of the lawyers who served a full three-year term starting in 1999. I was on that committee throughout my career until I moved on to our compensation committee, and then became the chair of the firm."



Patricia B. Santelle

Forced to Adapt

Banks moderated the second half of the webinar, leading off with how the pandemic altered the leadership landscape a bit and firms were forced to adapt.

"I've been at my firm for my entire career, going on 33 years this year," McKenna said. "I think one of the biggest challenges I see is what does this post-pandemic, work/life balance look like for us as a profession, and how does it impact the ability of attorneys, both women and men, to succeed in the firm, to have those professional development opportunities in order to progress and develop their practices?"

"I became a law firm manager because I had developed and demonstrated skills that folks have talked about, and also developed a brand within the firm," Santelle said. "That doesn't just disappear when you stop serving in the position. I found that I've even been able to make it stronger. I've been able to transition back to a robust, full-time client practice, which is great. I wouldn't have been able to maintain clients while serving as a managing partner without having developed a deep bench of talent and being a collaborator, all the skills that support being an effective law firm manager apply to the client relationships, as well. I emerged from the position being able to return to the client work, but also building on the skills that I had demonstrated and further strengthened as the law firm manager,

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in terms of relationships, collaboration both internally and externally. I lead and maintain really important initiatives within the firm, focused on client development. Who knows more about the clients of the firm than the managing partner? I didn't just turn that light off and walk away. People look to me as a resource, so I spend a lot of time helping other people with client development, as well as my own practice group. I've also got to do truly important things externally (that is, in the local legal and business community) as a result of being the managing partner, and I'm holding on to them. Some things I even have more time for than I had because I'm not sitting in meetings all day, so I can devote more time to serving the community at large."

When it comes to the home/office hybrid work policies in firms, "How's it working out?" Banks asked the panelists. "Are people following the policies?"

Most panelists' firms employ a hybrid home/office close to two days in-office and three from home. The common office days are Tuesdays and Wednesdays and home Monday, Thursday and Friday.

"The other thing that is very impor-

tant to me and I think we always think about is succession," McKenna said. "We are a firm that is more than 100 years old. This is our oldest office here in Philadelphia. I think about succession of people, in terms of people choosing to retire. I know that following the pandemic, some people made some life choices and said, 'I don't really want to be doing this anymore. I don't want to be practicing anymore.' Succession is a concern."

"The pandemic forced law firms and other workplaces to be more flexible," Santelle said. "I know a lot of attorneys including a lot of women raising children, who were able to be more productive working from home, even before the pandemic. I like that there's more open-mindedness toward that now. The caveat is that it cannot be a substitute for the critical in-person interaction. If you can't be in person every day, my advice is to take every opportunity to be in person, know when people are going to be in the office, and be there so that you can collaborate. When you are there, don't just sit in your office."

Santelle said she spent the first half of her career working full time in an office at least five days a week.

"It was really critical to developing

my practice, my skills as a lawyer, my collaborative practice," she said. "I've always worked out of the Philadelphia office because I work with people that are based there and we're very collaborative. I'll admit that I was used to having that practice before and then with the pandemic really we were forced to stay home, and I remembered that I could be very productive, but it takes a level of focus and commitment to being productive at home and out of the office. It's not for everyone."

Don't Depend on Zoom

But don't depend on virtual get-togethers to advance your career as a leader.

"I'm used to Zoom," Santelle said. "I'm not 'Zoom-worn.' I like it because I can see people: at least I see their faces and engage in conversation. My advice to especially the newer attorneys is if you can't be in person, use Zoom and be on the camera; if Zoom doesn't work, don't use e-mail instead of picking up the phone. If you can't be in person and you can't be on the camera, ask to have a conference call, because email just doesn't cut it as a substitute."

"If you want to be a leader in your organization, you have to be with

people in your organization, not just clients," McKeon said. "People have to see you. You cannot become a leader by Zoom. You cannot build a brand by Zoom. You cannot have people really observe you and you can't learn what you need to learn for leadership skills by Zoom."

"What I try to encourage others to do is to get out of the house and even the office sometimes," Coles said. "I don't mean all the time. It doesn't have to be a choice between your home office and your work office. Get out there, be with your clients, go bring in some new business by networking, have lunch with a contact, go to your deposition, live, because you're definitely missing something on a screen. Just be there. Be at the client's offices, do live interviews. I think hybrid has

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Podcast 40 Discovers Flexibility in Inflexible Real Estate Market

In Episode 40 of the PBA Law in the Family podcast, "Finding

Flexibility in an Inflexible Real Estate Market," Bill Rookstool, regional vice president of CrossCountry Mortgage, discusses the mortgage industry, impact of interest rates and the hidden opportunities for divorce clients in what could be a challenging real estate market. He also highlights how the market could provide the foundation for long-term financial success.

Rookstool has worked in the mortgage industry for 20 years. Based in Doylestown, he is the regional vice president for CrossCountry Mortgage, which

is a top-ranked purchase lender in Pennsylvania. As a Certified Divorce Lending Professional, Rookstool assists clients, divorce attorneys and financial planners to help them make informed decisions regarding their home equity solutions. He is also a real estate investor and developer in residential, multifamily and commercial real estate throughout the Philadelphia area.


The Law in the Family podcast host, Aaron D. Weems, is a partner and family law attorney at Fox Rothschild LLP in Blue Bell.

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opened doors and made a lot of what we do a lot easier, a lot smarter and a lot more efficient and I'm all for it."

Shifted Focus

Some firm managers have shifted focus to the community at large.

"Probably my favorite thing that I've done since I stepped down as managing partner is community engagement, including, but not limited to, pro bono work," Santelle said. "I spent seven years, as managing partner, really working hard to get other attorneys at the firm to do pro bono work. I told myself that it was time for me to do it. In the last three years, I've taken on matters for the Homeless Advocacy Project, the Senior Law Center, the Support Center for Child Advocates and Volunteers for the Indigent Program, and it's great."

"I don't really know how to sepa-

rate diversity, equity and inclusion issues from what I do," Coles said. "I simply integrate those challenges and opportunities with all of my leadership priorities when recruiting, and always looking to make sure that we have a diverse and collaborative environment. That's a must-have."

Banks observed that, for now, becoming a leader in the practice of law can be daunting and asked the panelists for their thoughts.

"A managing attorney is really a combination of being a school principal, a soccer mom and a UN diplomat, all rolled into one," Alford said. "Part of the challenge or requirement is you have to provide a forum for those who work around you to vent. You have to listen and be responsive but without promising something you can't deliver."

"The light at the end of the tunnel is the rewards that come from the hard work that goes into establishing yourself as a leader within the law firm and reaping the benefits of the skills and the relationships that you have developed as a result of doing that," Santelle said.

"There was a time when law firms just focused on business," McKeon said. "It was all about the business of law, and they really were not involved in inspiring people, focusing on things like how you balance your life, certainly mental health and well-being. Nobody ever talked to me about any of those things. That's not the way the world is now. Every CEO I know has focused on engagement."

Priorities come into play.

"Your family is your first priority, or your child is your first priority," Coles said. "Maybe you do need a flex schedule, but you have to do excellent work in all of those pieces of your life. It's perfectly fine to hit that reset button on priorities, and say, it's time to move this other one up now, and I'm going to put all of what I've got into those top three priorities."

Share your reactions or comments about this feature with Andy Andrews, editor, at Andy.Andrews@pabar.org.



Upcoming Events

Find more information in the PBA Events Calendar at www.pabar.org or call the PBA Member Services Center at 800-932-0311.

2024

Jan. 11-14	PBA 2024 Family Law Section Winter Meeting
Jan. 24-28	PBA 2024 Midyear Bench/Bar Meeting
Feb. 29-March 2	58th Annual Conference of County Bar Leaders
March 7	PBA Commission on Women in the Profession Virtual Spring Conference
March 21-23	PBA Statewide High School Mock Trial Competition

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