How to Manage Up

A step-by-step guide for junior lawyers

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ABOUT THIS GUIDE

Good lawyers aren't always good managers.

For the juniors working with them, this can mean last-minute instructions, late nights, cancelled plans, competing deadlines and unnecessary stress.

The aim of this guide is to teach junior lawyers to 'manage up', as a way to:

- **improve your working relationship** with your manager;
- gain more **control over your workflow**; and
- position yourself as somebody who is proactive, shows initiative, takes ownership, is easy to work with, and **irreplaceable**.

OUR OUTCOMES

By the end of this session, you should be able to:

01 Understand the benefits of 'managing up' and what it looks like in practice.

02 Have an idea of the actions you can take to start 'managing up'.

03 Start conversations with your manager to better understand their work, communicate ways you can help, and receive better feedback.

WHAT IS MANAGING UP?

Proactively taking steps to **understand** and **anticipate** the needs of the person you're working for.

By taking over some of the 'manager-level thinking', we make their job easier.

This, in turn, makes our own jobs easier (or at least more predictable).

It is **not**:

- sucking up to your manager;
- going above your manager's head; or
- upwards delegation.

Benefits

- More control over your workflow
- Leads to more responsibility and involvement in matters
- Effective working relationship with your manager
- Better communication, collaboration and performance

WHY SHOULD WE BE RESPONSIBLE FOR THIS?

By this stage, you might be wondering - "Isn't this our manager's job? Why are we doing this?"

And you're right.

But the reality is that many lawyers are not actually good managers all of the time. They might be too busy, or not have enough training, to delegate and coordinate workflows well.

This gives us two options:

01 **Hope that we have a good manager.**

02 **Do the things within our control to improve our working relationship with our manager.**

By opting for the latter, we can drive our own careers in a way that helps us:

- learn the skills needed for more senior roles in our organisation

- demonstrate that we're ready for the next level in our career

- reduce the chance of being handed a hospital pass

ALIGNING GOALS AND EXPECTATIONS

Understanding your manager

Instead of trying to guess what your manager's thinking, or what their working style is like – set up a meeting to ask them.

The key is to ask questions rooted in actual previous experiences instead of aspirational ones like "how would you ideally like me to follow up?"

Here are the sorts of questions that you might want to ask:

- Who is somebody that you've had a great working relationship with, and why do you think it worked well?

- What are the things that your juniors have done to make your job easier?

- With the tasks that I've done for you in the last few weeks, do you feel like you've had enough time to review my work and also give me a chance to make amendments?

Thinking one step further - your manager's manager & the client

Ultimately, the work you do will be passed upwards from your manager to their manager, to the client, to the client's manager etc.

It's incredibly valuable when junior lawyers think beyond the immediate task to the next level.

This can be in the form of:

Suggesting improvements

"I've done it this way but do you think it'd be clearer for the client if we reorganised the table so it looked more like this?"

Understanding how your work feeds into the final deliverables

For example, making sure your time entries are up to date with proper narratives because it feeds into the invoices your partner has to issue to the client.

ANTICIPATING NEEDS AND BEING PROACTIVE

EMAILS

01

Project Management

Extract actions and proposed due dates from client correspondence. Bonus points if you have a project tracker that you can continually update.

“Hi Jane, I’ve read through the 6 emails sent by [client] today and set out the action items below. I’ll keep updating this list as the day goes on.”

02

File Management

Save all correspondence and documents to the client / matter file.

“Hi Jane, just letting you know I’ve saved these documents to [system]. Attached is the link to the [document] if you’d like to review it now.”

03

Offer to do the first draft of the document / task

“Hi Jane, [client] has asked us to amend the contract to reflect the agreed issues list by Friday (4 August). I can prepare a first draft for your review by Thursday morning if you’d like.”

04 Get familiar with the client and your manager's style

Take note of the client's communication style, key contacts, approvals process, concerns, business drivers, preferred forms of documents, billing procedures, upload portals etc. Being aware of these things helps with providing a better personalised legal service.

Also keep an eye on how your manager writes emails, provides updates, and sends out final documents. It can be useful to save good examples into a folder.

05 Handle routine inquiries

Simple and routine inquiries from clients can be handled by junior lawyers, freeing up the senior lawyer's time for more complex and strategic matters. Check with your supervisor about the types of things they would like you to handle. For those tasks, if not you're not sure about your response, prepare a draft email for their review.

Ask to be copied into client communications

"Hi Jane - just to make sure I don't miss anything on the matter, would you mind cc'ing me on the emails?"

"I think there's been a few times the client hasn't cc'd me in as well. Are you okay if I tell them I'm helping on the matter and ask them to copy me in, or would you prefer to do it?"

MEETINGS

01

Prepare documents in advance

"Hi John - for this meeting, did you want me to prepare hard copies of [the draft advice] or anything else?"

02

Virtual meetings

Make sure the link and IT system works. Get the contact details for an IT person beforehand in case something goes wrong.

Check if you should share the relevant documents on screen in addition to taking notes.

03

In person meetings

Google Maps to see how to get there and when to leave – "Hi – for today's meeting with [client], it looks like it'll be a 20 minute taxi so we should leave by [10:35am]."

04

Meeting outcomes

For notes taken during the meeting, work up an action list and offer to circulate them.

"Hi John – I've got a list of actions from our meeting. Do you want me to send you a summary of those notes and the actions?"

DELIVERABLES

Timing

Work out a time buffer for:

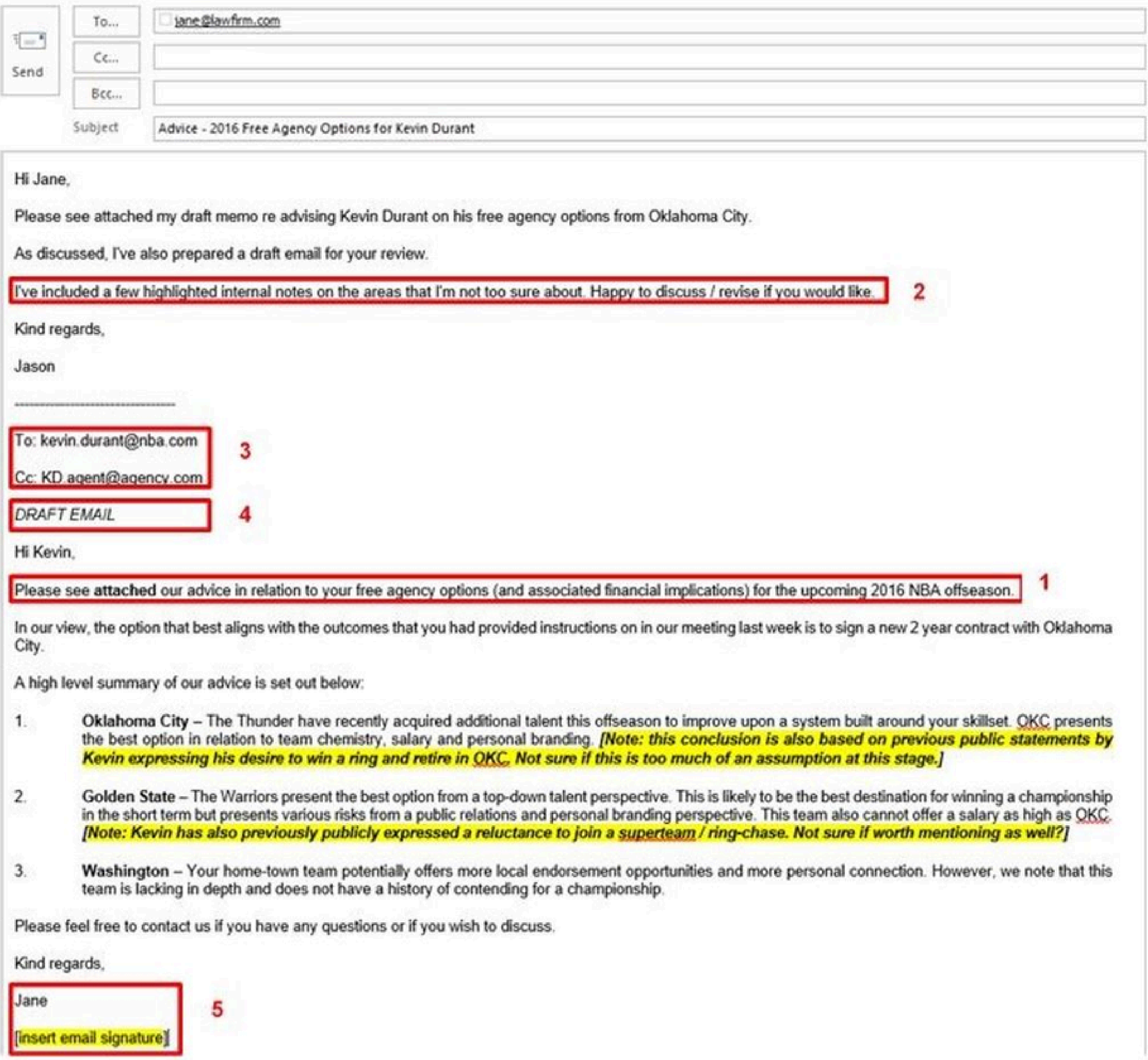
- your manager to review your work; and
- you to go back in and amend the work based on their feedback.

If there's a client deadline on Friday and you hand them your work on Friday morning, they'll probably have no time to get you involved again and just make changes themselves.

Prepare client-facing drafts (ghostwriting)

As an example, if you've been asked a research question:

- Newer lawyers might prepare an internal-facing answer to their manager along the lines of "*Hi Jane - please see below my answer to the question you've asked me this morning...*"
- A lawyer that's managing up might:
  - check whether that research is meant to be turned into a formal advice to the client;
  - ask further questions about what the instructing lawyer needs in terms of a final client-facing product; and
  - prepare a draft email and advice instead (see example on next page).



To... jane@lawfirm.com

Cc...

Bcc...

Send

Subject: Advice - 2016 Free Agency Options for Kevin Durant

Hi Jane,

Please see attached my draft memo re advising Kevin Durant on his free agency options from Oklahoma City.

As discussed, I've also prepared a draft email for your review.

I've included a few highlighted internal notes on the areas that I'm not too sure about. Happy to discuss / revise if you would like. 2

Kind regards,

Jason

To: kevin.durant@nba.com 3

Cc: KD.agent@agency.com

DRAFT EMAIL 4

Hi Kevin,

Please see **attached** our advice in relation to your free agency options (and associated financial implications) for the upcoming 2016 NBA offseason. 1

In our view, the option that best aligns with the outcomes that you had provided instructions on in our meeting last week is to sign a new 2 year contract with Oklahoma City.

A high level summary of our advice is set out below:

1. **Oklahoma City** – The Thunder have recently acquired additional talent this offseason to improve upon a system built around your skillset. OKC presents the best option in relation to team chemistry, salary and personal branding. ***[Note: this conclusion is also based on previous public statements by Kevin expressing his desire to win a ring and retire in OKC. Not sure if this is too much of an assumption at this stage.]***
2. **Golden State** – The Warriors present the best option from a top-down talent perspective. This is likely to be the best destination for winning a championship in the short term but presents various risks from a public relations and personal branding perspective. This team also cannot offer a salary as high as OKC. ***[Note: Kevin has also previously publicly expressed a reluctance to join a superteam / ring-chase. Not sure if worth mentioning as well?]***
3. **Washington** – Your home-town team potentially offers more local endorsement opportunities and more personal connection. However, we note that this team is lacking in depth and does not have a history of contending for a championship.

Please feel free to contact us if you have any questions or if you wish to discuss.

Kind regards,

Jane 5

[insert email signature]

1 Clearly identify and attach all relevant documents (worth a double check).

2 Set out and identify questions / assumptions (if any).

3 Set out the recipients ("to" and "cc").

4 Identify it as a "Draft Email".

5 Include the sender's email signature.

COMMUNICATION

1 Communication style

Try to understand your manager's communication style. Do they prefer to send you emails as tasks come through? Or do they use / are open to morning and end-of-day check-in meetings to assign tasks?

2 Unavailability

Where possible, communicate your unavailabilities ahead of time. For example, if you have upcoming leave or a social event, let them know when you will be next available, and offer to send a calendar invite to remind them of your unavailability.

3 Track the workflow and follow up

"Hi - just wanted to remind you about that draft email I sent you yesterday. Are there any changes you'd like me to make or should I just leave it for you to send out?"

4 Use your calendar

In law firms, we usually have some visibility over each others' calendars. Public calendars should:

- keep track of important dates (e.g. submission deadlines for court matters);
- block out time you're unavailable; and
- find time for feedback sessions / check-ins.

5️⃣ Workflow meetings

If your manager is open to it, set up regular 15-30 minute meetings to discuss workflow.

A recurring agenda for those meetings could be:

- FYIs that don't need discussion.
- Review of actions from the previous period
    - Updates from you
    - Completed work / wins
    - Blockers to progress
- What you need from your manager ("I've followed up on getting [this answer] from our tax team but haven't got a response. Could I draft an email for you to send out chasing them up again?")
- Updates from your manager
- Actions for the upcoming period

CONTINUOUS LEARNING

GETTING FEEDBACK

01

Run compares

Using document comparisons will show the differences between your draft and the final version that goes out to the client.

It's the easiest way to show the changes your supervisor has made in both style and substance. It's also great for generating specific questions for your supervisor to answer instead of a general "is there anything I could improve".

02

Set up post-project catch ups

Often it's easiest for supervisors to give feedback after a matter (or phase in that matter) has finished, instead of when everything is still ongoing.

"Hi Jane, I'm trying to get a bit more feedback on my work. Would it be okay if I set up a 15 minute meeting for me to ask you a few questions after we send this out to the client?"

03 Ask specific questions

One of the most difficult things for supervisors to do is give 'general' feedback. It's much easier (and more constructive) if you can identify a few specific areas to improve.

"I felt like I had trouble juggling the different tasks on this matter. Could you walk me through your process?"

"This is how I approached the task. Is there a better way you'd do it next time?"

"I think we've been doing a good job with [insert], but is there anything else we can do to get even better?"

04 Implement feedback and follow up

Supervisors like to know if their feedback had an effect. Taking a bit of time to follow up and share how a piece of advice has worked out can motivate them to keep providing feedback in future.

"Hey I just wanted to let you know that I tried out your process and it's been working a lot better now. Thanks!"

LEVERAGE YOUR STRENGTHS

1️⃣ **Identify your strengths**

Ask your friends, family and colleagues about what they think you're good at, or what they would recommend you for.

Think about the types of tasks you've enjoyed working on, or the projects that you're proud of.

2️⃣ **Understand your organisation's priorities**

Speak with stakeholders (your manager, your juniors, commercial team, HR, business development etc.):

- ask about their specific priorities and problems;
- listen to what they're complaining about; and
- think about what they're trying to achieve (e.g. service existing customers better, find new clients, develop junior staff, make work environment better?)

3️⃣ Work with your manager to take ownership of a goal

Keeping in mind your own strengths and your organisation's priorities, have a discussion with your manager to define a goal that you can work towards outside of your day-to-day tasks.

For example, the firm might be trying to get more renewable energy work. Some of the key areas might be solar farms, offshore wind farms and the hydroelectric sector.

You're good at researching, summarising information and preparing well-written articles.

You could discuss with your manager that you'd like to help them improve the firm's profile and brand in the offshore wind farm industry.

Over the next few months, you could:

- research and identify the key industry events and groups;
- attend and report back on industry issues and concerns;
- set up an idea for an article series addressing those issues from a legal perspective and preparing an outline of the suggested content;
- work with your manager to finalise and publish the articles; and
- create legal templates that clients in the sector can access and use following the article series.

NEXT STEPS

Our goals for this guide were to:

- understand the benefits of 'managing up' and what it looks like in practice;
- have an idea of the actions you can take to start 'managing up'; and
- start conversations with your manager to better understand their work, communicate ways you can help, and receive better feedback.

Here are some follow-up steps I'd recommend:

01 Understand your manager

Have a discussion with your manager about their goals, challenges and working style to understand where you can add the most value

02 Try out some of the 'proactive' actions

Choose some of the 'proactive' actions we've covered to start implementing today

03 Find an area that you can take ownership of

Start having a think about your strengths and the organisation's priorities. Find a way to link the two.

ABOUT THE PRESENTER

Hi, I’m Jason – I’m a construction lawyer and founder of **www.practisinglaw.com.au**.

I write how-to guides for junior lawyers to help them excel in the first few years of working in law firms.

For the past three years, I’ve presented training sessions for early career lawyers in both national and international law firms, with a focus on **actionable and practical advice**.

You can reach me at **jason.feng@live.com.au** to:

- run an actionable training program for your junior lawyers; or
- become a newsletter sponsor for my 10,000+ lawyer mailing list and 70,000+ Linkedin audience.