Best Practices in Support Staff Leverage:
How to Run a More Efficient Law Firm and Improve Profit Margins, While Maximizing Staff Productivity

Presented by: Terri Oppelt & Derek Barto
Armanino LLP - Law Firm Services Group
2019 Annual Conference & Expo
April 15, 2019

Learning Objectives: You Will Learn About

1. Understanding the concept of benchmarking is critical in accomplishing best practices in support staff leveraging
2. How to apply benchmarks to staffing roles to identify skills and training needed for effectuating change
3. Examine case studies for firms and practice areas using the right staff for the right work and how they got there
Where We Are Going

- Introduction
  - State of the law firm
  - Statistics and trends in the market

- Support Staff and Leveraging
  - Support staff and roles
  - Unpacking leveraging

Where Are We Going (Continued)

- How Benchmarking Can Help
  - Efficiencies
  - Profitability
  - Productivity
  - Benchmarking as a Tool

- Restructuring
  - Applying restructuring in the Firm
Where Are We Going (Continued)

• Outsourcing
  • The many faces of outsourcing
  • Components of successful project
  • Restructuring vs. Outsourcing or both

• Other Models to consider
  • Successful Leveraging Models
  • Rightsizing, downsizing and more

• The Future of Benchmarking

Introduction

• State of the Law Firm
  • Economic and eality factors
  • Socioeconomic factors
  • Change management impacts

• Statistics and Trends in the Market
  • Current Stats worth review
  • Beyond the most obvious benchmarks
Support Staff and Leveraging

• Support Staff and Roles
  • Identifying roles and skills
  • Identifying departments and practice areas

• Unpacking Leveraging
  • Measuring
  • Things to consider and watch out for

How Benchmarking Can Help

• Efficiencies
  • Factors affecting efficiencies
  • Retention, training and culture
  • Leadership and other

• Profitability
  • Billings
  • Profit margins
  • Expenses
How Benchmarking Can Help

- Productivity
  - Impact of technology
  - Willing learners and a culture of failing
  - Skill development opportunities
  - What to use to benchmark efficiency and productivity

- Benchmarking as a tool
  - When does benchmarking work best
  - When it doesn’t work

Restructuring

- Applying restructuring in the Firm
  - What to consider
  - When it’s right
  - Components of a successful restructure
  - How to benchmark your change
Outsourcing

• The many faces of outsourcing
  • Modern day and future outsourcing possibilities
  • What areas should be considered
  • Is outsourcing right for your firm’s future

• Components of a successful outsourcing project
  • Considerations for future leveraging
  • Benchmarking your outsourcing project

Outsourcing

• Restructuring vs Outsourcing or a Combination of Both
  • Expertise available
  • Dedicated in-house
  • Other considerations
Other Models to Consider

• Successful Leveraging Models
  • Teaming
  • Support teams
  • Admin Resource Centers, pods and more

• Right sizing, Downsizing and More
  • Right Sizing, Right Tasking
  • Downsizing, Scaling and Tailoring
  • What’s it all mean and how to benchmark it

The Future of Benchmarking

• What’s next and where do you want to go
• What three things do you need to get started
Terri Oppelt  
*Director, Armanino Law Firm Services Group*  
Terri.Oppelt@ArmaninoLLP.com  
(310) 745-5856

Derek Barto, CPA  
*Principal, Armanino Law Firm Services Group*  
Derek.Barto@ArmaninoLLP.com  
(310) 745-5839