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COMMUNICATIONS AND ORGANIZATIONAL MANAGEMENT

How to Ace Legal Administrator Succession Planning

Savvy firms are including administrator roles in their development strategy to prevent operational challenges.

BY ERIN BRERETON

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A succession plan can help prevent costly skill gaps and institutional knowledge loss — yet less than a third of law firms (30%) have one, according to a [survey](#) accounting service provider Withum conducted.

Firms that do tend to focus their planning on attorney-based roles often omit planning for legal administrator positions — which can pose some risks, says Cynthia Thomas, Executive Director of law firm management consultancy PLMC & Associates and a member of the Greater Los Angeles Chapter.

An administrator, for instance, may be the sole person who knows a small firm's banking and trust account passwords, Thomas says. Some might serve as the main vendor contact.

"Firm administrators are the keepers of all the keys; there is not someone [else] who has integral access to all the information that is needed to run the firm," she says. "It can cause your business continuity to come to a standstill."

Advantageous Integration Attributes

With a number of long-time employees, succession planning has been a consistent consideration for national law firm Husch Blackwell, according to Chief Operating Officer Angela Quinn.

During the 25 years Quinn has spent at the more than 1,000-attorney firm, she's transitioned into several different roles — trial attorney, Partner, Director of Strategic Growth, and Director of Operations for the Healthcare, Life Sciences and Education unit.

"We've always, whether on the attorney or the business leadership side, had that philosophy — making sure you are identifying the next leader of the group," she says.

Husch Blackwell's executive leaders discuss possible chief-level position successors on a quarterly basis in anticipation of future leadership needs, and firm members have frequently given ample notice before leaving, Quinn says.

The former Chief Executive, for example, announced his retirement more than a year before it occurred, which allowed his successor to spend several months working with him, visiting the firm's more than 20 offices and meeting with business professionals and associates.

"She would be at lockstep with Paul, the previous Chief Executive, being part of the conversations," Quinn says. "She took over officially having had a lot of exposure to the various issues and projects we're working on."

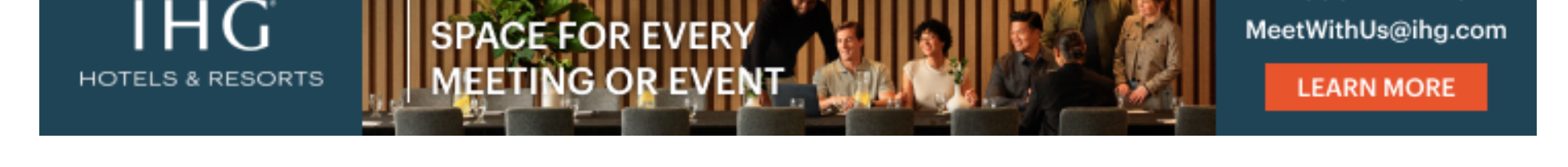
Being able to shadow the person who holds a role can help successors comprehend nuanced operational aspects such as how meetings have been run.

"[It provides] a lot of lead time for you to get up to speed, understand the culture [and] develop relationships before you're actually responsible for any particular part of the job," Quinn says. "They just get to meet people, learn about them and build trust, which is critically important to get anything done."

The firm is now preparing to find and assimilate its next Chief Financial Officer; the current one, who has worked at Husch Blackwell for more than 30 years, will retire in May 2026.

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"Each time we've had a succession like this, there is a plan put together," Quinn says. "We've already started working on the things we want to make sure this person understands, who they meet with — an entire onboarding integration plan so we're ensuring there's [a] transfer of knowledge from one person to another."



Beginning the Process

Smart law firms understand the importance of including legal administrators in their succession plans, says Gerry Riskin, Founder of legal advisory service provider Edge International.

The Managing Partner at one firm he works with recently said he felt senior lawyers working in prominent areas should look at possible successors — and hoped the head of the firm's administration function would, too, Riskin says.

"Some haven't thought it might be a good idea to address this," he says. "[Without a] contingency plan, senior leadership is going to have to [contemplate], should we get a fractional Chief Operating Officer? A fractional COO and CMO and some interim help? Is there someone on our team we have not seriously thought about promoting but should consider making an acting COO?"

If a firm hasn't previously factored legal administrator roles into its succession planning efforts, conducting an inventory to identify critical positions and the associated responsibilities can be a good place to start, according to Riskin.

Firms can then review the scope of their talent resources.

"What do our people have expertise in that they would be capable of handling?" Riskin says. "Let's say an administrator really understands the protocols we use to preserve our database for cases and file matters [and] data about our clients. We might have another administrator who has not got a clue; they farm it out."

Effective succession planning takes more than just retirement- and illness-related vacancies into account. Career aspirations can play a part— which Riskin says department heads may be able to uncover through conversations with employees.

"What about that young individual who's doing a great job?" he says. "What do we do if something happens to them? Very few firms think about that. [They] think, 'That person is 35 years old; what could happen?'"

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Succession Plan Execution

Law firms can utilize several methods to help prepare the individuals they've earmarked as successors to eventually take on new roles, including assigning them different tasks that align with the corresponding job proficiencies.

Firms might also want to encourage succession candidates to pursue external training, Thomas says, such as a local college's paralegal program or an ALA course for industry members who are in the early stages of their career.

"I look at the various positions I had — I grew with the firm," she says. "People move jobs more frequently now; they don't see a vested [employer] interest. There are a lot of roles individuals can grow into with either internal or external training, and it's better to have someone who's been there five years stay for 10, as opposed to [having to] keep bringing new people in."

Seattle-based Hones Law provides continuing education stipends to help its employees advance to other roles. Founder Edward Hones believes that as the backbone of modern practice management legal administrators should be part of the firm's planning endeavors.

"We've taken a proactive approach to succession planning that goes beyond just grooming future partners," Hones says. "We recognize a sustainable law firm isn't just about having a rainmaker at the top, it's about ensuring the people who handle operations, client intake, compliance and workflow are growing alongside the attorneys."

Some of the firm's investments to foster its high-potential administrative talent have involved mentorship and cross-training opportunities.

"Our strategy includes creating documented pathways for advancement," Hones says. "By linking succession planning with employee growth, we're not only protecting the firm's long-term stability, but also improving retention and morale in the present."

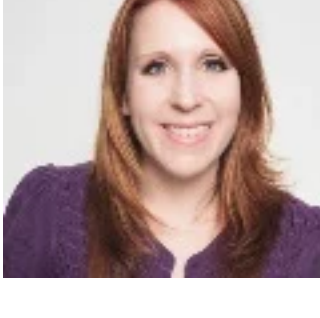
Newly anointed administrators may appreciate having a written record of all aspects of their predecessor's job — ranging from available health insurance plans to anticipated partnership progress, Thomas says. She once spent a year-and-a-half documenting systems and other information after replacing a law firm administrator who'd retired.

"[The firm felt] like, 'She has been an administrator before; she knows how to do everything,'" she says. "But I don't know where you keep everything. Everyone uses Microsoft Outlook. Not everyone uses folders [or] sets their systems up the same. I sat in the role and put things into place, creating a playbook of what is what and what's where."

Thomas also recommends establishing specific objectives to ensure knowledge transfer and other succession plan elements remain on track. Most law firms, she says, seem to be comfortable working with a timeframe of five or more years.

"A five- to seven-year plan is an easy sweet spot because you could put some definable markers into trying to bring in the next person," she says. "Finding the person is going to take time, and you have to make sure the candidate is really and truly [who] you would like to... carry on the legacy. The more years you have on your side, the easier it's going to be to hit those milestones."

ABOUT THE AUTHOR



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