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— CHANGE . . . RESULTS . . . SUCCESS —

YOU DON'T KNOW WHAT YOU DON'T KNOW

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Looking back, I realize how much time and effort my father invested in guiding my development. Not my physical health. No, that was definitely my mother's wheelhouse, and dad took care not to step on her toes. And it wasn't politics. In fact, mom and dad never discussed politics. Mom held her suffrage rights closely guarded to her heart.

I guess nowadays I would call it ethics; a philosophical approach to fairness, success and how one treats others. Mostly, my father told stories to communicate these things. His stories were pretty simple but rambled about enough to keep my interest and attention. Mostly, the world he communicated to me was a two-dimensional good v. bad. It was so easy to tell which was which back then.

One value he stressed was doing everything to the highest level I was capable of. He used to tell me that it didn't matter what I ultimately did with myself. Whether I chose to be a mother and homemaker, a nurse, an astronaut or an executive, what mattered is that I did the job as well as it could be done. With care and diligence, and full engagement. No matter what the occupation, he promised he would love and respect me as long as I did it with intentionality.

I was fortunate to have the opportunity to work and grow in a variety of positions and industries in my career. I approached each one with a fresh curiosity to figure out where and how I could leave everything I touched better off than I found it. I consistently sought to pick the brains of everyone around me, in order to learn as much as possible.

It was clear that my father was indeed proud of my mounting accomplishments. At some point I noticed he enjoyed hearing my stories more than telling them.

I started with the Pennsylvania Bar Association in January 1999. I had been managing law firms from the inside for just under two decades to that point.

The most important information for me was to figure out what would define success. Once I knew that, I had confidence I could develop a game plan to deliver what members needed and wanted most.

I was incredibly fortunate for the mentors who voluntarily stepped up. Really, it was just a few long-time active members, who decided to directly invest time in my success. My “assistance” was usually accompanied by a lunch or dinner.

It was always time graciously provided for me to ask a lot of questions and pick some insightful brains. At the top of the list was Keith McLennan of Miller, Turetsky, Rule & McLennan in Collegeville, Montgomery County. He was not the only mentor. Dale McClain quickly comes to mind, too. But I can say without reservation that Keith provided the clearest and brightest illumination of the path to success as PBA’s law practice management coordinator.

Keith helped me understand the demographics of bar members, and the impact on what I needed to deliver. The majority of members were from solo & small firms, and what they needed was someone like me to help them with managing all the various issues that arise day-to-day in a firm, as well as over the working lifespan of the owners. And as I quickly came to realize, even more-so as retirement and closing of the office came into focus. With the aging of the bar membership, issues surrounding reaching the tail end of one’s career now dominate my focus.

Midsized and larger firms had their own “Ellen” on staff. They only needed me to have deep dive information for specific strategic topics like compensation schemes, elevation to partner, attorney departure, moving a firm, conducting a retreat, the latest and greatest tech and so forth.

Another big need identified early on was assistance for those starting a practice. It might be a newly minted attorney, or someone looking to spin off from a large firm environment to their own firm. For most, starting a practice from scratch is almost overwhelming. So many details to organize and

prioritize. The devil lives in those details. Fortunately, making plans is a strong part of my wheelhouse. I'm a pretty good cheerleader, too.

I like to think of myself as a savant when it comes to practice start-ups. I have assembled a resource over the course of years, which provides food for thought and guidance in every essential area. I have learned, however, that this roughly 2,000-page beast requires too frequent an update. Some sections, like technology, are in constant flux.

I have now transitioned to a more interactive hands-on approach. I have kept some parts of the resource, like the excellent checklist. I provide that and some other resources for review prior to setting up the first of what is usually a series of calls.

No two start-up calls are alike. No two calls cover the same duration or number of calls. It depends on how long it takes for each new firm owner to achieve "launch" and then settle into their practice feeling confident.

Within minutes of the first call's start I know whether I am working with someone who already has a vision of what their firm will be about, including things like ideal clients, referral sources, practice areas and often expectations about earnings, lifestyle and balance. Usually, they are the experienced attorneys leaving a larger firm environment. But that isn't always the case. I recently assisted a newly minted attorney who had thought through many of these questions already. I was astounded at how quickly he was up and running and tracking his revenue against goals set.

Probably the biggest challenge for me in these situations is to educate the attorney I am assisting so that they see a full realm of possibilities. That often changes the trajectory of the practice. I also want to make sure there are clear identifiers for the inevitable potholes and detours. Yes, the negatives are also part of the realm of possibilities.

Sometimes my cheerleading qualities are needed to help assure the attorney that they are *not* crazy in setting up their own firm. I can't guarantee success—no one can—but I can identify the behaviors, attitudes and best practices to make it very likely, and help the attorney incorporate them into the very foundation of their firm.

What's key here is that the attorney must acknowledge and appreciate that they don't know what they don't know. Regardless of the years of experience practicing law, it doesn't mean that there is actual knowledge of the business aspects of running a successful law firm. It's not rocket science, but

as any established solo or small firm attorney will admit, there's a lot more to it than one expects.

This article is just a reminder to all our members— regardless of your age, location, and job responsibilities— that I am a resource you can count on for assistance on the business side of your practice. Even if you don't want to open your own firm and are enjoying the salary and benefits a larger firm can provide, you may start to wonder whether you want to be an owner/partner at the firm some day. I can help you explore the possibilities, ask yourself the right questions and become more proactive about what you'd like to have happen.

If you are one of the thousands of members who have benefited from my assistance over the years, I invite you to recommend the law practice management hotline to a colleague.

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