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**Managing Partners and Management Professionals:  
Institutional Work Dyads in Professional Partnerships**

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## **Abstract**

This study presents an empirical analysis of the micro-dynamics of institutional work and develops a multi-level model of the process of institutional change. The institutional change in question is the “corporatisation” of large international law firm partnerships. The institutional workers are the managing partner and management professional (typically a qualified accountant with overall responsibility for managing the law firm’s business services functions). This study identifies the significance of the dyadic relationship that develops between these two different types of professionals and demonstrates how this dyad becomes a key mechanism of institutional work in this context. It demonstrates how these individuals draw upon their differing social positions as embedded and external actors (and their differing sources of specialist expertise, formal authority, and social capital) to collectively engage in institutional work. The paper presents these individuals’ accounts of their actions and interactions to illustrate the micro-dynamics of the institutional work dyad and, in so doing, demonstrates the processes by which individuals translate, enact, and influence broader shifts in institutional logic.

**Key words:** Institutional work, Lawyers, Management professionals, Professional partnership.

## **Introduction**

Institutional work refers to the purposive and practical actions through which individual and organisational actors create, maintain, and disrupt institutions (Lawrence and Suddaby, 2006; Lawrence, Suddaby, and Leca, 2009). The concept has rapidly gained prominence in recent years but is still relatively underdeveloped. Various limitations and areas for further research have been identified (e.g. Hwang

and Colyvas, 2011; Kraatz, 2011; Willmott, 2011). Lawrence, Suddaby, and Leca (2011), for example, have invited researchers of institutional work to explore agency as a distributed phenomenon, focusing on “how individual actors contribute to institutional change, how those contributions combine, how actors respond to one another’s efforts, and how the accumulation of those contributions leads to a path of institutional change” (p. 55).

The current study responds to Lawrence, Suddaby, and Leca (2011) by presenting an empirically-based analysis of the micro-dynamics of institutional work. The institution in question is the professional partnership. The organisational field is large international law firms operating in the City of London. The institutional workers are the managing partner<sup>1</sup> (i.e. the partner with overall executive responsibility for managing the firm) and the management professional<sup>2</sup> (i.e. the most senior management professional, typically a qualified accountant serving as CFO or COO, who has overall responsibility for managing the business services functions within the firm).

This study explores the micro-dynamics of institutional work by presenting detailed accounts of the actions and interactions of managing partners and management professionals in nineteen of the largest international law firms operating in the City of London. It asks: *how have managing partners and management professionals jointly engaged in institutional work within professional partnerships*. Whilst addressing this question by focusing primarily on the accounts of individual actors, the study also examines the significance of institutional and organisational level dynamics in this

context, thus responding directly to Battilana and D’Aunno’s (2009) call for multi-level analyses of institutional work.

As will be demonstrated, large international law firm partnerships are experiencing a change which breaks with the institutional field’s prevailing institutional logic – a development referred to by law firm partners as the “corporatisation” of partnership (Angel, 2007). In these “corporatised” partnerships the traditional emphasis on diffuse authority and individual autonomy, long fundamental to the partnership form of governance (Greenwood and Empson, 2003; Empson, 2007), is being replaced by more explicit and hierarchical governance structures and stringent partner performance measurement and management systems (Cooper, Hinings, Greenwood, and Brown, 1996; Galanter and Henderson, 2008; Regan, 2002).

By examining how individual actors engage in institutional work, the study makes four theoretical contributions to the emerging body of literature in this area. First it identifies the *dyadic relationship* that develops between the managing partner and management professional and demonstrates how this dyad represents a key mechanism for institutional work in this context. Second, it explores the *micro-dynamics of this dyadic relationship* by identifying the specific actions and interactions of these individuals. Third it combines a *micro-level analysis of institutional work* with a *macro-level analysis of field level change* to demonstrate the recursive relationship between individual action and institutional change. Fourth, and finally, it demonstrates how a micro-level study can reflect *macro-level institutional processes*, specifically a higher level boundary meeting of two professional projects: law and accountancy.

The current study is timely in two respects. First, as explained in more detail in the next section, it represents a response to recent calls for more research into how individual actors within organisations engage in institutional work. Second, it represents a response to recent regulatory changes in the UK. Following the Legal Services Act, 2007, it is now possible for non-lawyer management professionals to become partners in UK-based law firms. According to a recent survey, 54% of the UK's 150 largest law firms are "likely" to adopt this change to their partnership (*Legal Business*, March, 2010), which suggests there is value in developing a deeper level of insight into the role and significance of management professionals in this context.

The paper proceeds as follows. It begins with a brief overview of theory development in the area of institutional work, focusing in particular on the relationship between micro-level actions and macro-level institutional change. It then presents a detailed review of archival material conducted for the current study (practitioner publications from 1991 to 2011) to demonstrate the "corporatisation" of large international law firms operating in the City of London and the increased significance of the management professionals in this context. The paper then outlines the research design and introduces the multi-level model of the dynamics of institutional work within professional partnerships. A detailed empirical analysis of micro-dynamics of the institutional work dyad then follows, which highlights the actions and interactions of managing partners and management professionals in the current study. The paper concludes by exploring the implications of this micro-level study for macro-level theory concerning professionals' more general engagement in field reconfiguring institutional work. It also examines the implications for future research.

## **Institutional work**

The concept of institutional work represents a reaction against neo-institutional theory's tendency to privilege macro-level explanations of processes of institutionalisation – i.e. to emphasise structure at the expense of agency (Lawrence and Suddaby, 2006; Lawrence et al, 2009). Whereas institutional theory has focused on the processes by which institutions govern the actions of organisations and individuals, institutional work broadens the focus to encompass how the actions of individuals and organisations affect institutions.

## **Recursive relationship between individual action and process of institutionalisation**

Early articulations of institutional theory in fact emphasised the recursive relationship between individual actions and processes of institutionalisation (e.g. Meyer and Rowan, 1977; Scott, 1987; Zucker, 1977). Specifically Berger and Luckmann (1967), in their treatise on the social construction of reality, argued that the process of institutionalisation encompasses three phases: *externalisation*, where individuals take action, *objectification*, where individuals interpret these actions as having an objective reality separate from themselves, and *internalisation*, where individuals internalise the objectivised world. Subsequent articulations of neo-institutional theory turned away from this recursive relationship to emphasise the constraining effect of institutions on individual action – it therefore has struggled to account for institutional change.

The concept of institutional entrepreneurship, articulated by DiMaggio (1988), developed by Seo and Creed (2002), and extended by many others (see Battilana,

Leca, and Boxenbaum, 2009) has been an attempt to explain the process by which actors bring about institutional level change. However, this approach also has limitations. Whilst it overcomes the tendency within neo-institutional theory to depict actors as “cultural dopes” trapped by institutional arrangements, it perhaps overcompensates by suggesting an extreme concept of individual agency, depicting institutional actors as “hypermuscular institutional entrepreneurs” (Lawrence et al, 2009). This approach suggests that institutional entrepreneurs are somehow more rational and more powerful than the norm, able to defy institutional pressures to conform, and able to engage in independent action in order to bring about institutional change (Hallet, 2010). As Powell and Colyvas (2008) argue, “Not all change is led by entrepreneurs and surely heroic actors and cultural dopes are a poor representation of the gamut of human behaviour” (p. 277). Given this emphasis on heroic actors it is perhaps surprising that individuals rarely feature in studies of institutional entrepreneurship. While some *theoretical models* of institutional entrepreneurship have encompassed individual as well as organisational actors (Battilana, Leca, and Boxenbaum, 2009), the individual level of analysis has been largely neglected within *empirical studies* of institutional entrepreneurship (Hardy and Maguire, 2010), which have tended to focus on the interaction of organisational and institutional dynamics (e.g. Greenwood and Suddaby, 2006; Lounsbury, 2002; Sherer and Lee, 2002).

At the heart of the concept of institutional work is the belief that institutions and agency exist in a recursive relationship (Lawrence et al, 2011) which reflects the cycle of externalisation, objectification, and internationalisation originally expressed by Berger and Luckmann. Institutional work at the individual level can, therefore, be

seen as a key diffusion mechanism, translating field level changes into micro-level changes while, at the same time recognising that the actions of institutional workers help to shape institutional logics. Previous studies of institutional change have depicted an essentially uni-directional relationship, emphasising the extent to which existing institutional logics structure the attention of individual actors (e.g. Anand, Gardner, and Morris, 2007; Thornton, 2002). These actors then “persuade others in their organisations of the merits of innovation, experiment with innovation (and then) modify it in order to gain internal legitimacy” (Hwang and Powell, 2005, p. 247). In contrast to such previous articulations of processes of institutional change, institutional work highlights the potential for distributed agency, suggesting that institutional work is “something often accomplished through the coordinated and uncoordinated efforts of a potentially large number of actors” (Lawrence et al, 2011, p. 55). It therefore adopts a broader orientation than studies of institutional entrepreneurship, emphasising the mechanisms by which individual and organisational level actions have an impact on the institutions with which they are engaging, i.e. the micro-sociology of institutions (Hallet, 2010).

### **Paradox of embedded agency**

A focus on institutional work rather than institutional entrepreneurship makes it possible to develop a more nuanced understanding of why some actors engage in institutional change and others do not, and why some actors do so successfully while others fail (Battilana and D’Aunno, 2009). Many studies of institutional entrepreneurship have focused on social position as an explanation for actors’ varying propensity to engage in institutional change (e.g. Greenwood and Suddaby, 2006; Lounsbury, 2002; Sherer and Lee, 2002). Social position mediates actors’

perceptions of the institutional field they seek to enter (or in which they are embedded), as well as their access to the resources necessary to engage in institutional entrepreneurship. At the heart of these debates is the paradox of embedded agency (Seo and Creed, 2002). As Garud, Hardy, and Maguire (2007) describe the paradox: “dominant actors in a given field may have the power to force change but often lack the motivation; while peripheral (actors) may have the incentive to create and champion new practices, but often lack the power to change institutions” (p. 961). This suggests that peripheral, low-status, or external actors will therefore be more likely to attempt to change institutions because they have less to lose and more to gain. However, previous studies of institutional change in the context of accounting (Greenwood and Suddaby, 2006) and law firms (Sherer and Lee, 2002) “where prestige matters” (p. 104), have demonstrated the role of dominant, embedded, actors in bringing about institutional change. How can this apparent contradiction be reconciled? As Battilana and D’Aunno (2009) assert “the paradox of embedded agency is still a central issue in institutional theory because institutional theorists have never explicitly tackled the issue of human agency” (p. 42).

Again an institutional work perspective creates the opportunity for a deeper level of insight by introducing a greater degree of nuance to analyses of the paradox of embedded agency. It gives rise to questions raised by Battilana and D’Aunno (2009) such as: why does one individual embedded in a specific organisational context engage in some form of institutional work while his or her colleagues remain constrained by the prevailing institutional logic?, or why does an individual engage successfully in institutional work while others fail? Viale, Suddaby, and Gedron,

(2012) suggest that varying responses and outcomes may reflect varying degrees of institutional reflexivity. Individuals' different range of experiences (including their educational background, organisational role, and previous employers) may affect their willingness and ability to question and actively challenge the institutional status quo. Fligstein (1997, 2001) and Hallet (2010) have pointed to individuals' social skills and ability to build social capital as key determinants of their effectiveness in this area.

The numerous models of the process of institutional entrepreneurship which have been developed in recent years have tended to gloss over the practical, creative work necessary to make the diffusion of innovation happen (Lawrence and Suddaby, 2006). Similarly, while the theoretical studies of institutional work emphasise the importance of understanding the micro-dynamics of individual level actions and interactions, as yet very limited empirical work has been done in this area.

### **Role of professionals in institutional change**

Whilst institutional work within professional partnerships has received very little attention to date, there is a growing recognition of the role that professionals play in initiating and mediating institutional change in society more generally, and in helping to redefine and reconfigure existing institutions (Hwang and Powell, 2005; Loft, Humphrey, and Turley, 2006; Scott, 2008). In their advisory capacity, professionals are particularly skilled at influencing both their clients and employers, acting as a mechanism for the diffusion of new ideas about managerial practice (Kirkpatrick and Ackroyd, 2003; Oakes, Townley, and Cooper, 1998). This is one of the ways in which they enact their professionalisation project (Sutton, Dobbin, Meyer, and Scott,

1994). Suddaby and Viale (2011) have identified four key mechanisms by which professionals bring about change at an institutional level. Professionals can use their expertise and legitimacy to challenge the incumbent order and define a new space. They can use their social capital and skill to populate the field with new actors. They can introduce new rules that change the boundaries of the field. Finally, professionals can manage the use and reproduction of social capital to confer a new status and social order within the field. However, Suddaby and Greenwood (2005) have highlighted the potential for boundary disputes when professionals from different professions seek to colonise a new institutional space.

The relatively undeveloped empirical base of the emerging theory of institutional work creates many substantive opportunities for contribution. The current study focuses on three of these. First, as yet “the question of how individual actors...engage in institutional work remains largely unanswered” (Battilana and D’Aunno, 2009, p. 41). There is a need, therefore, to identify the concrete practices and specific actions employed by actors engaged in institutional work (Lawrence et al, 2009). Second, recent articulations of institutional work have highlighted the need to develop a deeper understanding of the distributed nature of agency (Lawrence et al, 2011) – to focus on “a supra-individual level of analysis...concerning what people do *together*” (Hallet, 2010, p. 67, emphasis added). And third, whilst celebrating the “inhabiting of institutions” which institutional work represents, scholars have emphasised the importance of explicitly linking the micro-level actions of institutional work to the more macro-level processes of institutional change, i.e. to conduct multi-level analysis (Battilana and D’Aunno, 2009).

## **Institutional change in large international law firms**

The current study focuses on the institution of the professional partnership within the institutional field of large international law firms operating in the City of London. The term “large international law firm” is widely used to refer to the elite global law firms and their immediate competitors (Faulconbridge and Muzio, 2009; Morgan and Quack, 2005; Sherer and Lee, 2002). These include the *Legal Business* “Top 25”<sup>3</sup> which is made up of the “magic circle” of elite global law firms and “second tier” UK-based firms (*Legal Business*, December, 2009) together with leading US-based firms who compete directly with them in the London market. These firms perform large-scale technically complex and specialised transactional and litigation work and compete directly with each other for international clients and graduate recruits at elite universities and law schools. They therefore constitute an institutional field in that they represent the totality of relevant actors/organisations that “in the aggregate constitute a recognised area of institutional life”, including networks of social relations and structured systems of social positions among organisations (DiMaggio and Powell, 1991, p 64).

These large international law firms are undergoing *divergent change*. In other words, they are experiencing a change which breaks with the institutional field’s prevailing *institutional logic* – the shared understanding of goals to be pursued and how they are to be pursued (Greenwood and Suddaby, 2006). As elaborated in detail below, the field level and organisational level enabling conditions have given rise to a new logic within these partnerships that is more consistent with a corporate model.

### **Enabling conditions: Field level and organisational level change**

The waves of financial deregulation and privatisation, that began in the early 1980s in the UK and subsequently spread throughout Europe, created substantial business opportunities for law firms based in the City of London and attracted leading US law firms to the London market (Morgan and Quack, 2005; Sherer and Lee, 2002; Spar, 1997). Encouraged by booming levels of profitability, the partners of large City of London based law firms embarked on a sustained programme of international expansion (Faulconbridge, Beaverstock, Muzio, and Taylor, 2008; Morgan and Quack, 2005). Between 1998 and 2008 the four largest of these firms (Linklaters, Freshfields, Clifford Chance, and Allen & Overy) grew from £1.3bn to £4.8bn in revenue terms (*The Lawyer Top 25 Firms*, 1999; *International Financial Services London*, 2009), and from 5,500 to 11,500 in terms of lawyers (*BI City Business Series*, 1999; *International Financial Services London*, 2009).

This strategy of international expansion was predicated on the assumption that global clients increasingly required a globally integrated legal service and would be prepared to pay a premium to receive it (Angel, 2007; Faulconbridge et al, 2008). Global clients were developing large in-house legal functions staffed with expert purchasers of legal services who demanded a higher standard of service at a lower cost (Galanter and Henderson, 2008). To deliver a supposedly seamless global service at a realistic price, large international law firms needed to develop large-scale operational and infrastructure management expertise, together with an integrated approach to the business services functions across an expanded network of offices, more sophisticated business development skills, and more tightly managed costs (*Legal Business*, May 2003; Segal-Horn and Dean, 2007, 2010). While such

practices were widespread in the corporate sector and among the global accounting firm partnerships, these changes represented a significant innovation within the legal sector.

These *field level enabling conditions* (i.e. regulation, competition, client requirements and cost pressures) interacted with the *organisational level enabling conditions* (i.e. increasing scale and complexity) to give rise to the changing institutional logic, i.e. the “corporatisation” of the large international law firm partnerships.

### **Changing institutional logic: “Corporatisation” of large international law firms**

The institutional logic of the firms in this field traditionally encompassed professional autonomy, clan control, and representative democracy (Empson, 2007; Greenwood, Hinings, and Brown, 1990). In place of hierarchical relationships, associated with the corporate form of governance, partnerships sustain more ambiguous and negotiated relationships amongst professional peers, who are the firm’s owners as well as its core-producers (Adler, Kwon, and Heckscher, 2008; Greenwood and Empson, 2003). The resulting combination of diffuse authority and individual autonomy represents a fundamental precept of the partnership form of governance (Empson and Chapman, 2006; Empson, 2007).

While these large international law firms have remained partnerships in legal form, lawyers, legal academics, and the practitioner journals argue that they have become more “corporate” in practice (Angel, 2007; *Legal Week*, 13 November, 2003; Posner, 2002; Regan, 2002; Wilkins, 2007; *The Law Society Gazette*, 23 November 2000).

As Cooper et al state, in this evolving model of law firm partnership “efficiency

dominates autonomy and democracy...and management takes on a more assertive and powerful role.” (1996, p. 6).

In the “corporate-style” law firm partnership, partners have generally retained the right to elect representatives from among their ranks to senior management positions for a fixed term. Therefore, while authority in these firms has become more clearly delegated to senior management (Chambliss, 2009; Empson, 2007; Galanter and Henderson, 2008; Regan, 2005), managerial authority is still highly contingent on the ongoing support of the partnership (Segal-Horn and Dean, 2010; Pinnington and Morris, 2003). At the same time, partner autonomy has been gradually eroded by the introduction of formalised partner performance management systems (Empson, 2007; Faulconbridge and Muzio, 2008, 2009), incorporating mechanisms such as 360° feedback and balanced scorecard measurements more typically associated with the corporate sector, alongside substantial modifications to lockstep methods of remuneration and the introduction of a limited form of performance related pay (*Legal Week*, 20 January, 2011, 8 December, 2011; *The Lawyer*, 29 September, 2011, 24 October, 2011). These changes have been associated with a greater preparedness to remove partners from the partnership by de-equitising them or removing them from the firm altogether (*Legal Week*, 13 November, 2003; 6 July, 2006, 15 February, 2007, 3 April, 2008; *The Lawyer*, 9 June, 2008).

### **Rise of the management professional**

The introduction of management objectives and practices traditionally associated with the corporate sector (i.e. the changing institutional logic) has been accompanied by a change in the status and role of “non-lawyer” managers within these firms. As

early as May 2000 *The Law Society Gazette* argued that, “in the case of the larger firms, the non-lawyer business expert has changed the face of legal practice altogether” (p. 97). More recently the anticipated changes brought about by the Legal Services Act, together with the off-shoring of aspects of legal services, has served to consolidate the increasing significance of the management professional’s role and status within large international law firms (*Legal Business*, May, 2007, March, 2009, February, 2010, March, 2010). In a 2008 survey, 82% of heads of business services functions in the Top 100 UK law firms agreed they were now playing a more central role in the day-to-day running of their firm than they had been five years previously (*Legal Week*, 24 April, 2008).

In the early 1990s very few law firms employed senior management experts. As *Legal Business* commented (January/February, 1994, p. 10), the running of “multi-million pound enterprises has been left in the hands of management novices”, or “amateur managers” as *Legal Week* (28 March, 2002) described the lawyers. With its revealing title, “Bringing in the Administrators”, a *Law Society Gazette* article of April 1996 managed to convey the increasing need for non-lawyer managers whilst simultaneously signifying the relatively lowly status that lawyers conferred upon them. As late as 2007 Gabarro asserted, lawyers still had a tendency to view “any functional staff roles or non-producing managers at the firm-wide level as dangerous signs of bureaucracy, useless overhead, or intrusions of an alien ‘corporate’ culture.” (2007, p. xviii). This is evidenced by lawyers’ use of the terms “fee-earners” and “fee-burners” to distinguish between themselves and non-lawyer managerial and support staff (Forstenlechner, Lettice, and Tschida, 2009; Muzio and Ackroyd, 2008).

The increasing scale and complexity of the management task in large international law firms has created the need for more professionalised management (Faulconbridge et al, 2008) and with it, the need for more “professional managers” (*Managing Partner Magazine*, 31 March, 2008) or “non-lawyer business experts” (*Law Society Gazette*, 5 May 2000) who had “cut their teeth in the corporate world” (*Legal Week*, 17 November, 2005). This change has been represented by the creation of the COO and CFO role within large international law firms - the two roles are often combined within large international law firms, though in some firms the CFO reports to the COO. In 2005, reviewing the changes that had taken place over the previous ten years, a leading practitioner journal stated:

“More power and greater expectations are now associated with the chief operating officers' and financial directors' roles...For many of the largest global law firms, these functions have changed drastically during the past decade, and will continue to evolve as firms adopt structures more similar to corporate management.” (*Legal Week*, 17 November, 2005)

In the same year another leading practitioner journal stated:

“The leading finance directors are becoming as integral to running and managing a law firm as any of its partners...The (role of the) FD in a law firm extends far beyond the realms of pure accountancy...It is possible to see their role as that of a managing partner overseeing strategic and operational functions, just as the actual managing partner oversees the whole firm.” (*The Lawyer*, 22 August, 2005).

The role and status of management professionals in large international law firms has therefore increased significantly in the past 20 years as a new more corporate-style governance has developed. The senior management professional (whether called COO or CFO) reports directly to the managing partner but may also have a position on the Board, either in an executive or advisory capacity (*The Lawyer*, 22 August, 2005). However, as this study will demonstrate, while structures and systems have changed, the beliefs and behaviours associated with the traditional professional partnership persist among many partners. This is the phenomenon of “sedimentation” first observed in law firm partnerships by Cooper et al (1996). Similarly Kirkpatrick and Ackroyd (2003) and Hanlon (2004) have argued that elements of multiple organisational forms can coexist within a law firm partnership so that archetype “incongruence” can be seen as the norm rather than a transitional phase.

## **Research process**

In order to examine the micro-dynamics of institutional work and address the question: *how have managing partners and management professionals jointly engaged in institutional work within professional partnerships*, this paper draws upon three distinct research studies. These were conducted between 2003 and 2010 (see Table I), during which the focus on management professionals and the theme of institutional work gradually emerged. Consistent with Greenwood and Suddaby’s (2006) study of institutional change, therefore, the process of data collection and analysis was not neatly ordered and designed in advance of fieldwork.

The two preliminary in-depth research studies by the first author<sup>4</sup> into changing forms of governance and leadership dynamics within two large international law firms drew attention to the increasing significance of management professionals in this context. We then conducted a third cross-sectional study interviewing 30 managing partners and managing professionals in nineteen of the largest international law firms operating in the City of London to focus specifically on the actions of management professionals in law firm partnerships and their interactions with lawyers. In order to demonstrate the field level change and the newly emerging logic, our primary data collection was supplemented by archival analysis of 700 editions of the preeminent practitioner publications in this field and other relevant publications by professional bodies and government regulators going back over 20 years (see Table 1). The results of this archival analysis have already been presented in the previous section of this paper.

All phases of the study utilised qualitative and inductive methods. This approach proved valuable for the multi-level analysis exploring interpersonal dynamics among specific management professionals and lawyers, alongside the broader institutional context of evolving roles and remits of management professionals. We adopted a primarily interpretive perspective, reflecting Suddaby and Greenwood's (2010) explication of methodological issues in studies of institutional change.

### **Phases 1 and 2: Law firm case studies**

The first study of partnership governance revealed that non-lawyer managers were developing positions of increasing influence within the firm's business services functions (see [Authors removed] for details of methods and findings).

TABLE I Scale of field work			
	<i>Phase 1 (Case Study 1)</i>	<i>Phase 2 (Case Study 2)</i>	<i>Phase 3 (Cross-sectional Study)</i>
Law firms	1	1	19
Managing Partners and other lawyers interviewed <i>59 total</i>	28	21	10
Management Professionals interviewed <i>31 total</i>	9	3	19
Additional contextual interviews <i>12 total</i>	-	-	12
External publications 1991-2011	Includes review of over 700 publications from: Specialist practitioner journals - <i>Law Society Gazette</i> , <i>Legal Business</i> , <i>The Lawyer</i> , <i>Legal Week</i> Professional bodies - American Bar Association, Law Society, Legal Services Board, Solicitors' Regulation Authority Government and related publications - Legal Services Act, Legal Services Consultation Document		

To reflect these findings, management professionals were incorporated into the second research study of leadership dynamics (see [Author removed] for details of methods and findings). These case studies highlighted four significant, interconnected and emerging themes. The first was the role of the managing partners in recognising the potential value of high calibre management professionals and promoting their influence within the partnership. The second was the influential but ambiguous position of certain heads of business services within the leadership dynamics. The third was the persistence of “snobbery” about non-lawyers

among some partners which constrained the activities of management professionals. The fourth was the need for management professionals to navigate conflicting attitudes among the partnership and proceed cautiously when seeking to exercise influence.

### **Phase 3: Cross-sectional study**

The cross-sectional approach of the third study enabled us to establish whether these four emerging themes were represented more broadly across the institutional field of large international law firms operating in the City of London and to investigate the remit and influence of management professionals in this context.

**Interview sample** – Our Phase 3 interviews focused on nineteen of the largest international law firms operating in the City of London<sup>5</sup>. Our sample included nine out of the “UK Top 10” firms, together with other firms drawn from the *Legal Business* “UK Top 25” (*Legal Business*, December 2009/January 2010), supplemented with selected US-based firms operating in the City of London competing directly with the “Top 25”. Within these firms we conducted eleven interviews with managing partners (or equivalent – see note 1) and eighteen interviews with senior management professionals. Almost all the management professionals quoted in this paper had the title COO or CFO (one had the title CEO) and almost all of these were qualified accountants. We conducted an additional twelve interviews with management professionals in corporate (in-house) legal departments, executive search consultants specialising in management professionals in the legal sector, and partners in senior management roles at accountancy firms with highly developed business services functions. All interviews were semi-structured, lasted between 60

and 120 minutes, and were digitally recorded and transcribed. For interviewees within the law firms questions explored a broad range of themes such as: nature of interviewees' role, how role has evolved over time, how they work with their counterpart (i.e. managing partner or management professional), specific challenges associated with their role and relationship, and personal background. For the contextual interviews, questions focused on how the external observers in the study perceived the changing status of management professionals and the changing nature of large international law firms.

***Initial analysis*** - Reflecting the inductive nature of the study, interviews were initially coded using Atlas.ti to focus on broad descriptive themes such *how* and *why* the change had come about and *what* were the implications for the specific firms. High level codes included: *reasons for process of initial recruitment of management professionals, changing role and remit, position in management structure, working relationships with lawyers, challenges faced and how they were addressed*. The relevance of institutional work and the dyadic relationship between two different types of professionals (i.e. the managing partners who were all qualified lawyers and the most senior management professionals who were typically qualified accountants) began to emerge during the analysis process.

#### **Phase 4: Application of institutional theory**

Our preliminary analysis highlighted lawyers' traditionally dismissive attitude towards non-lawyer management professionals (echoed by a similar lack of attention on the part of professional service firm scholars). We decided, therefore, to focus on this

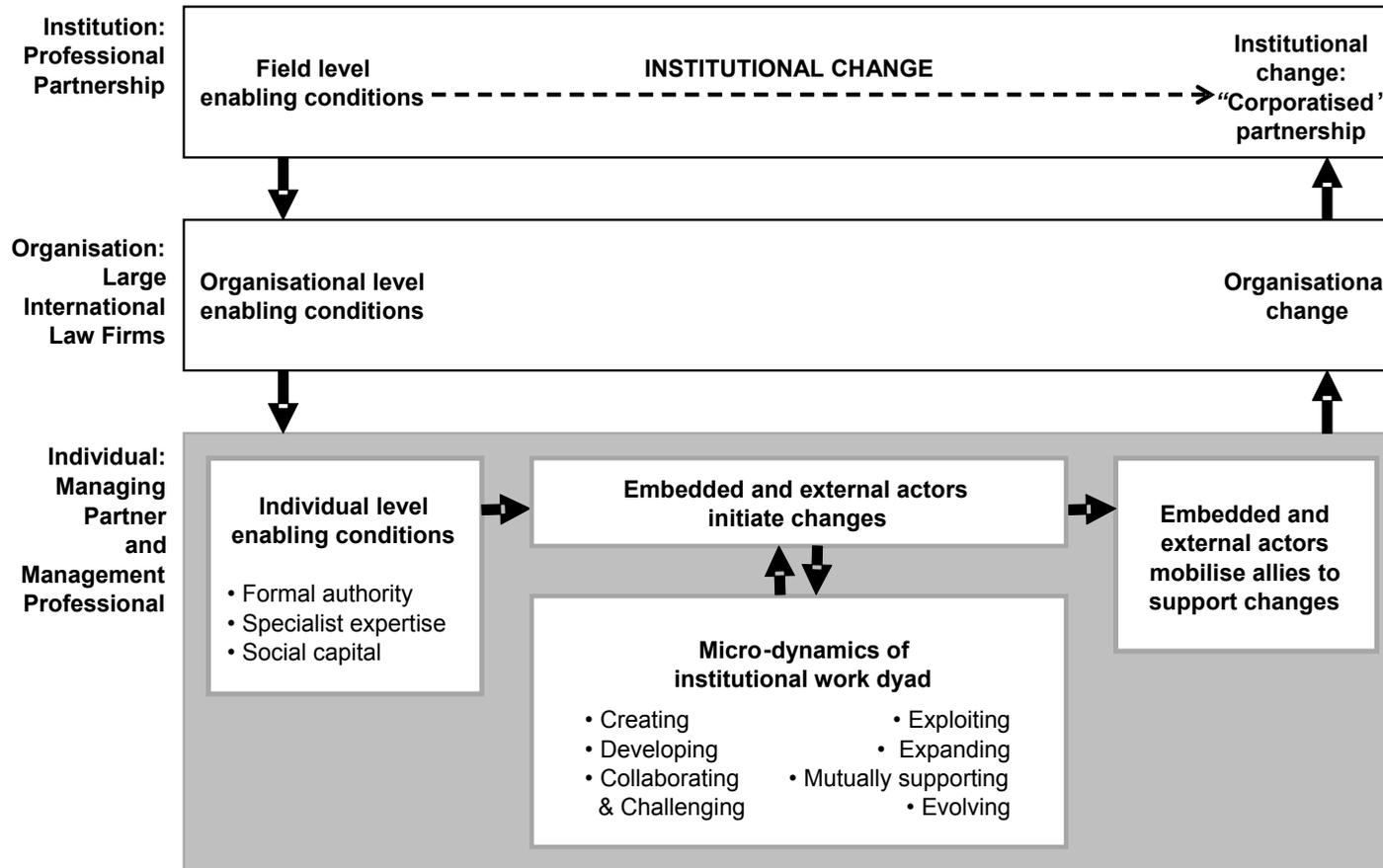
group of professionals and to give a “voice” to non-lawyer management professionals in our study.

To provide a structure for the next stage of our analysis we developed additional codes derived from Battilana et al’s (2009) model of institutional entrepreneurship. As yet no detailed conceptual or empirically-based models of the processes of institutional work have been published. This prompted us to select Battilana et al’s model of institutional entrepreneurship as it explicitly recognises the role of individual alongside organisational actors and was therefore more suited to our examination of the micro-dynamics of institutional change. Our codes therefore reflected concepts embedded in Battilana et al’s model such as: *enabling conditions (field and organisational characteristics)*, *actors’ social position (formal authority and social capital)*, *creation of vision for change*, *mobilisation of allies behind vision*, and *diffusion of divergent change*. We gradually supplemented and adapted these concepts as new themes emerged from our data to develop a process model of the dynamics of institutional work in professional partnerships (see Figure 1).

We followed an iterative process of analysis, repeatedly moving between extant theory, our interview and archival data, and our emerging process model (presented in the following section). Having organised our analysis around the categories highlighted in our model, we then reduced each category of quotations from management professionals into themes that supported and challenged our model.

Figure 1

Dynamics of Institutional Work within Professional Partnerships



### **Phase 5: Challenging and refining analysis**

Having given a platform to management professionals by focusing our initial analysis on their interviews, we then challenged the validity of their accounts in two ways.

First we looked for inconsistencies in the views of managing partners and highlighted any situations where their interpretations differed appreciably from those presented by management professionals. Second, in order to obtain feedback we presented our findings to a panel of industry experts, including a former managing partner and senior partner of two large international law firms. Finally we challenged our interview data by returning to the archival analysis of practitioner journals and publications by professional regulators.

### **Dynamics of institutional work in professional partnerships**

The empirical material from the current study which identifies the micro-dynamics of institutional work is presented in the following section. The multi-level model of the dynamics of institutional work that was derived from this data is presented below.

The model (see Figure 1) outlines the recursive relationship that exists between the institutional, organisational, and individual level of analysis in the context of institutional change.

The *institutional field level enabling conditions* (i.e. the regulatory, competitive, client, and cost pressures already discussed) interact with the *organisational level enabling conditions* (i.e. increasing scale and complexity) to create the preconditions for institutional work. The micro-dynamics of institutional work occur at the individual level within an organisation and, in the context of this study, are centred around the

dyadic relationship that develops between the managing partner and management professional.

The micro-dynamics of institutional work begin with the *creation* of the dyad, as the managing partner recognises the changing external environment and need for organisational level change, and responds by recruiting the management professional. This dyad *develops* as the managing partner delegates operational aspects of his<sup>6</sup> role to the management professional and the management professional initiates changes within his or her operational remit and seeks to expand the role. In time, as the dyad grows stronger, the managing partner and management professional *collaborate* more closely, sharing tasks such as strategy development and initiating broader-ranging strategic changes. Yet they may also come into conflict because of their differing standpoints and, as the management professional grows more secure, he or she may *challenge* the managing partner more directly. Similarly the managing partner may *exploit* the position of the management professional, in effect protecting his own social capital by using the management professional as a shield against partner disapproval for management action. In parallel with this, the management professional may seek to *expand* his or her influence beyond the dyad by strengthening and extending their relationship with a broader group of partners. More generally, the successful institutional work dyad is characterised by *mutual support*, as the managing partner and management professional utilise their differing forms of social position: the formal authority, specialist expertise, and social capital as described below. The dyad ultimately *evolves* as the managing partner's term of office expires.

Fundamental to the effective functioning of this dyad is the interaction of the two very different social positions of the managing partner and management professional as embedded and external actors respectively. Neither the managing partner nor management professional has extensive *formal authority*, but the former has some whereas the latter has very little. While the managing partner is reliant upon the management professional's *specialist expertise* in management to envision change, the management professional is reliant upon the managing partner's *social capital* to help implement change. By working together, they are able to draw upon their differing social positions as embedded and external actors within the firm to engage collectively in institutional work. The management professional, once recruited, becomes "internal" to the firm but remains "external" to the partnership.

Through these micro-dynamics of institutional work the managing partner and management professional (as embedded and external actors respectively) are able to initiate organisational level changes and mobilise the support among influential partners within the firm required to implement these changes. As other firms within the institutional field respond to their common set of field level enabling conditions, mimetic pressures will ensure that more conservative firms ultimately respond in a similar manner. In this way, organisational changes may be cumulatively experienced within multiple firms in the same institutional field – and collectively result in *institutional change* within that field.

## Micro-level change: Relationship dyads as a mechanism for institutional work

The following empirical section presents the data from which the model in Figure 1 has been derived. The details of the micro-dynamics of the dyad described below are summarised in Table II.

<b>TABLE II</b>		
<b>Micro-dynamics of dyad - Actions and interactions of:</b>		
	<b><i>Managing Partner (Embedded actor)</i></b>	<b><i>Management Professional (External actor)</i></b>
<b>Creating dyad</b>	Recognises changing market conditions and need for “professionalisation of management”.  Recruits management professional.	Recognises opportunity to bring external management expertise to relatively undeveloped sector.
<b>Developing dyad</b>	Delegates operational aspects of his role to management professional with minimal oversight.  Gradually develops relationship with management professional and recognises scope of his/her expertise.	Seeks to define and expand his/her role.  Educates managing partner about full potential of his role.  Initiates specific changes within his/her direct remit.
<b>Collaborating and challenging within dyad</b>	Share tasks previously performed by managing partner alone. Work closely together to develop strategy and initiate higher level broader ranging strategic changes. Challenge and critique each others’ ideas and approaches.	
<b>Exploiting dyad</b>	Protects own social capital by using management professional as shield.	
<b>Expanding beyond dyad</b>		Gradually develops relationships with other partners to extend influence.
<b>Mutually supporting within dyad</b>	Deploys limited authority and extensive social capital to gain support for management professional among partnership.	Deploys extensive specialist expertise to advance managing partner’s agenda.
<b>Evolving dyad</b>		Builds relationship with newly elected managing partner on retirement of previous managing partner.

## **Institution of partnership in the early 1990s: Attitudes to management and management professionals**

In the early 1990s none of the large international law firms in our study employed senior management professionals. As one management professional explains.

“When I joined (the legal sector), having a well qualified, experienced outsider was something pretty new. There were only two or three of us (i.e. CFOs). My opposite number at A&O and a chap at Herbert-Smith were probably the only people who had experience outside the legal profession and who were chartered accountants.” (ManPro, Study 3, i2)

Management was often undertaken by a committee of partners, typically chaired by an elected managing partner, with each member responsible for specific areas such as Finance, HR, Marketing, or IT. These “well-intentioned lawyers” (ManPro, Study 3, i2) who served on management committees might represent the “movers and shakers” in the business (ManPro, Study 3, i13) but their authority was constrained by the fact that they remained in these roles subject to the continuing support of their peers and that partners as a whole had considerable autonomy to make ad hoc individual decisions about management-related issues.

Typically the partners who served on management committees also continued with fee earning activities. Lacking specialist functional management expertise, and with limited time to develop it, they relied on non-lawyers to implement day-to-day operations. These non-lawyers might, for example, include book-keepers who managed billings, or ex-secretaries who managed HR administration. They were “pure operational managers not thinking managers” who “did the bidding” of the

partners to whom they reported (ManPro, Study 3, i13). They “were told what to do rather than thought up things to do...it was more a sort of master-servant type relationship” (ManPro, Case Study 1). A management professional refers to this behaviour as “partner pleasing” (ManPro, Study 3, i4), arguing that at this time business services staff focused on currying favour with individual partners rather than on maximising operational efficiency. They sought, in effect, to enhance their social position by affiliating themselves with individual partners rather than their fellow business services staff, who could resemble “a very dysfunctional group of siloed people fighting with each other” (ManPro, Study 3, i4).

### **Creating the dyad: Managing partner recruits management professional**

One of our interviewees explains that in the early 1990s he “threw” himself at a law firm having seen an opportunity to bring external management expertise to a sector which appeared to be “100 years back in time” (ManPro, Study 3, i13). More typically, it was a relatively far-sighted managing partner (or equivalent – see note 1) who recognised the changing nature of the market for international legal services, as described earlier in this paper, and sought out the management professional. In other words, the introduction of an external actor was sponsored by a high status embedded actor.

“Our managing partner...had a vision that actually we don’t need two partners locked up in this piece of management. Actually you can have somebody from a professional, non- legal background running a number of functions. So what he created was actually quite far-sighted at the time because I don’t think there was anybody else doing that.” (ManPro, Study 3, i5)

“(Our managing partner)...was ahead of a lot of his competitors in seeing the importance of how do we build recruiting strategies, develop our people and move them forward. The whole point of professionalisation of management - he saw that. He wasn't seeing it happening within the legal industry and therefore went outside to recruit for it.” (ManPro, Study 3, i8)

“When I joined, (the senior partner had) only just been appointed...He decided that he wanted to change the structure and one of the things he wanted was to have a professional business person come in and help him run the organisation.” (ManPro, Study 3, i7).

In order to gain access to specialist management expertise, managing partners had to look outside the legal sector because of the dearth of high quality management professionals in law firms. All of the senior management professionals in our study had considerable experience of working in the corporate sector and/or other professional service firms. Some COOs and CFOs had previously been partners in accounting firms and almost all had worked in accounting firms whilst studying for accountancy qualifications.

### **Developing the dyad (1): Managing partner and management professional negotiate their roles and develop relationship**

At the time of recruitment the managing partner typically explained to the management professional that he wanted to bring about the “professionalisation of management”, but was not very clear about what this might entail or the extent to

which this might mean ceding responsibility to the management professional. As one management professional explains:

“It's frustrating because you want to perform to the best of your ability in these roles but you're prevented from doing so, in a way, by the structure that says – ‘yes we want professional management in our firm but we want the right to veto what you suggest’.” (ManPro, Case Study 1)

Partners more generally had a rather limited understanding of what management might mean and how it could be delegated to a management professional. One interviewee described law firm management at this time as “arguing over the choice of toilet paper” (Study 3, i20). The comments of the partner below reflect a similarly narrow conception of management.

“We have to recognise that the day to day management of an organisation of this size requires people who are dedicated to that and that alone. We'd all like to be able to say that we can influence the choice of pencil type that goes in the stationery cupboard but in fact we really don't want to spend time on those kinds of issues.” (Partner, Case Study 1)

As an embedded actor, the managing partner had no direct experience of the potential opportunities created by hiring a “thinking manager” and may not have envisaged the full extent of changes he was setting in motion. In other words, there were unintended consequences of purposive action, consistent with Lawrence et al's (2009) conceptualisation of institutional work. Some of the management professionals emphasise that in order to convince the managing partner and other influential partners what “professional management” could mean in practice, they

found themselves educating the managing partner about what his own role might reasonably encompass, as well as seeking to define a role for themselves.

“When they went into a recession I demanded that they have really got to understand where you make money and where you don’t. And that was very controversial initially. I remember taking a list of partners showing how much they had billed to the managing partner and him (asking) whether he should have that information.” (ManPro, Study 3, i12)

It is noticeable in the above comment that the management professional says “*they*” rather than “we went into a recession”, even though he was responsible for the finances of the firm. This phraseology emphasises how he understands his status as external actor, i.e. as an employee he is internal to the firm but remains external to the partnership. The embedded actor saw that changes in management practice and attitudes to management were necessary. The external actor could help him to see what the change might be.

### **Developing the dyad (2): Management professional initiates specific changes within direct remit**

In the meantime, whilst building a relationship with the managing partner and seeking to define a role for him or herself, the management professional initiated specific changes within the business services function (i.e. his/her direct areas of responsibility) though even these changes may have required the support of the partners more generally. For example, one COO recalls:

“We had to go through an organisational re-structuring to get the marketing team sorted out...That came across a lot of resistance because the partners felt they

understood how marketing should be run in a law firm...but they don't necessarily have some of the disciplines I can bring to organisational design. That created a lot of tension but I did succeed in getting them to accept the change." (ManPro, Study 3, i4)

The management professional often sought to gain greater control over the business service areas by introducing a matrix style management, so that business services staff around the world reported to him or her in the centralised business services function as well as to the lawyers in charge of local offices. In the process, the management professional began to build cohesion within the business services area and enhance his/her social capital.

Several management professionals talk about how they upgraded the quality of their business services staff. For example:

"I brought in a couple of more professional, senior people...I raised the level of professionalism within the individual functions...and also brought it together...so the supporting functions are now effectively run as a business as opposed to six different functions that just happen to get together on occasions." (ManPro, Study 3, i7)

One management professional (ManPro, Study 3, i12) explains how, partly by upgrading the quality of people, the finance department was able to accommodate a ten-fold increase in the size of the firm without any concomitant increase in the number of finance staff.

In some firms, as the number of senior high quality management professionals increased, they began to develop a collective strength. For example, in Case Study 1 they persuaded their managing partner to introduce a “mini-MBA” executive education programme for senior business services staff. In the process, they were enhancing their social capital (a point developed later in this paper) as well as enhancing their specialist management expertise.

**Collaborating and challenging within the dyad: Management professional and managing partner work closely together and critique each other**

Over time, within successful dyadic relationships, the managing partner has become more comfortable delegating aspects of his work to the management professional and allowing him or her to operate with only limited oversight. As one management professional explains:

“I am left (alone)...the limits are my own creativity and ability to come up with something that will deliver what they want.” (ManPro, Study 3, i1)

At the same time, while leaving him or her alone to get on with some aspects of the job, the managing partner also works very closely with the management professional in other aspects. Many management professionals stress the close and collaborative personal relationships they have developed with their managing partners, so that many see themselves in the role of “right hand man”. Some management professionals interviewed explain that they are located in the office adjacent to the managing partner, who may spend more time in their company than with any individual partner. As one states:

“We sit next door to each other. We spent all day yesterday out on a strategy session, just me and him.” (ManPro, Study 3, i2)

Sometimes, when it is not possible for the managing partner to attend a meeting, he may send the senior management professional as his ‘alternate’. As one management professional explains:

“I sit on all the committees. I deputise for (the managing partner)” (ManPro, Study 3, i2). At other times, the management professional attends meetings together with his or her managing partner, for example, to offer support during challenging budget negotiations with a practice head. However, as one managing partner explains, the management professional will fail “if they are just basically seen as management’s Rottweiler” (ManPar, Study 3, i15).

As a reflection of the management professional’s growing status within the partnership, he or she is able to challenge the managing partner directly, whilst recognising the need to do this in private “so that people’s dignity is maintained” (ManPro, Study 3, i1) and so that conflict within the dyad does not become apparent to the partnership. One management professional (ManPro, Study 3, i3) recounts how he told the managing partner that he was refusing his request to recruit another senior marketing director “until you get your act together” because the previous three marketing directors had been heavily criticised by the partnership and not supported by the managing partner. Referring to his ongoing conflict with the managing partner over this issue, the management professional explains:

“That was an interesting period (but) at the end of it...the managing partner said ‘OK. I’ll take responsibility’.” (ManPro, Study 3, i3)

## **Exploiting the dyad: Managing partner uses management professional as shield**

Some management professionals understand their role as “right hand man” may mean that they are deliberately used by the managing partner to protect them in politically awkward situations with fellow partners. As one management professional recalls:

“As we went into the meeting, (the managing partner) said to me ‘we are going to play this as a good cop , bad cop’. I was supposed to be the bad cop.” (ManPro, Study 3, i13)

For significant controversial issues managing partners may require the management professional to take the lead in introducing the initiative, enabling the managing partner to protect himself somewhat from the anticipated backlash from partners (i.e. forcing the management professional to “spend” his or her own social capital rather than put the social capital of the managing partner at risk). The following describes an extreme case of this “fall guy” phenomenon.

“We introduced partnership assessment centres four or five years ago but it was a little bit like Alice in Wonderland...No one was actually failed...So I said ‘this can’t be right, you have got to fail a number of people on this’. The senior partner and managing partner said ‘yes, we agree’. So we failed 10%, a very small percentage of candidates, and all hell breaks loose, from the senior people whose candidates have failed...and this battle raged for 2-3 weeks until finally it died down a bit and the senior partner and managing partner then put their heads back above the parapet and said, ‘yes we agree with this and have agreed all the way along’.” (ManPro, Study 3, i6)

### **Expanding the dyad: Management professional extends influence among broader partner group**

The management professional is first and foremost concerned with running the business services function. To make changes outside business service areas, the management professional requires the strong support of other influential partners as well as the managing partner. As one management professional explains:

“You’ve got an awful lot of people who may not appear in a management structure but you can’t just give instructions to them, you have to get them to do what you want through different means and you have to...spend a lot more time persuading them.” (ManPro, Study 3, i1).

The management professional’s relationship with the embedded actors in key management roles and informal positions of influence is therefore crucial to his or her ability to exercise influence and operate effectively within the partnership. As one describes it:

“I work closely with a dozen partners around the world who manage certain clients. I have a close professional relationship with them and they value what I do.” (ManPro, Case Study 1)

Another management professional explains how, through his powers of persuasion among the partnership, he has been able to bring about a change which goes far beyond his operational remit and has had far-reaching consequences for the partners in terms of how they deliver legal services to clients:

“Take the off-shoring project. That was quite a radical change for us...How did I go about that? Well first of all, I worked out that it really was a good idea and there was a proper business case for doing it. I then went to the management

group and put the proposal there and got reactions and adjusted things that I thought were necessary to get it approved. Having got management approval for doing something that was likely to be somewhat contentious within the (practice areas) I then went and talked to the (practice areas).” (ManPro, Study 3, i5)

Management professionals require considerable social skills, as Fligstein (1997, 2001) would suggest, in order to manage these relationships successfully and to engage in effective institutional work. Various management professionals give examples of their predecessors who did not spend sufficient time developing their social capital and were ultimately rejected by the partnership and forced to leave the firm (an experience which reflects Hallet’s (2010) study of institutional work in the educational sector).

**Mutually supporting: Managing partner and management professional utilise relative social positions**

Whilst the managing partner may use the management professional to help smooth the passage of a controversial initiative, more generally the relationship is mutually supporting.

Fundamental to the micro-dynamics of this relationship dyad are the different sources and relative strengths of their *social position* which enable them to work together in a mutually supportive manner. Individually it is difficult for them, as embedded and external actors, to engage in institutional work within the context of a professional partnership. By working together they are able to overcome the limitations of each other’s social position, making it possible for them to engage jointly in institutional

work. Our interviews highlight the significance of the interaction of *formal authority* as well as *social capital* (as previous studies have suggested) but our study gives equal prominence to a third dimension, *specialist expertise* in management, as a necessary component of social position when seeking to mobilise allies around management changes. These are summarised in Table III and illustrated in detail below.

<b>TABLE III</b> <i>Management professionals and managing partners: Relative social positions</i>		
	<b>Managing Partner</b> <i>(Embedded actor)</i>	<b>Management Professional</b> <i>(External actor)</i>
<b>Formal authority</b>	Extensive (at least notionally). But entirely contingent on ongoing support of partnership.	<i>Amongst partnership:</i> Limited. Contingent on ongoing support of managing partner.  <i>Within business services area:</i> Potentially extensive.
<b>Specialist expertise in management</b>	Limited. Typically no experience outside legal sector.	Extensive. (Relative to managing partner).
<b>Social capital</b>	Extensive. Built up over many years within partnership. Evidenced by election to partnership and subsequently to managing partner.	<i>Amongst partnership:</i> Develops gradually and partially. As a result of their own initiatives in relationship-building and successful track record. Also through association with social capital of managing partner and other influential partners.  <i>Within business services area:</i> Extensive (potentially).

**Formal authority:** Interviewees are very aware that the managing partner operates within significant constraints and that his contingent formal authority has direct

implications for the formal authority of the management professional. As one management professional explains:

“(There are) a number of people who are opinion formers, people whom, when the global managing partner wants to introduce something, he will consult with them...Once he has got them on side, then he knows he can move and there is somebody there other than him to counter disagreements...the global managing partner hasn’t taken the decision on his own.” (ManPro, Study 3, i3)

Aware of their limited formal authority, a few management professionals have managed to garner as much formal status as possible at the time of their initial appointment. Normally, however, it takes time for a management professional to “earn the right” to serve on the major committees of governance. Some long-established management professionals report that they regularly attend Board meetings without formally being a Board member while others have secured significant formal positions in the governance structure. Referring to the position of these non-lawyers on the Management Committee, the managing partner emphasises:

“That I think does give them a certain degree of authority in the organisation...(they) are privy to decision making, to information that is not available to all of the partners.” (ManPar, Study 3, i15)

***Specialist expertise in management:*** The managing partner is clearly at a disadvantage in relation to the management professional in terms of specialist management expertise. For example, only one of the managing partners interviewed had an MBA and most have only limited expertise in finance and accounting. They

also have very limited experience of management roles or of working outside the legal sector. Apart from perhaps a brief secondment to the legal department of a client firm, managing partners have typically worked in law firms (and often just one law firm) for their entire careers. They therefore do not have the opportunity to act as “boundary spanners” in Greenwood and Suddaby’s terms (2006), constraining their ability to engage in institutional work. By contrast, the senior management professional, typically with a background in accounting, has experience of other sectors, such as investment banking, management consulting and the corporate sector. His or her social position, therefore, supports and supplements that of the embedded actor by bringing perspectives from outside the institutional field. In addition to utilising the financial expertise gained through their accountancy background, some of the COOs in our study have been able to play a significant role in developing strategy within law firms, having in their previous firms learnt the tools and techniques of strategy development.

In this context, the current study emphasises how the embedded actors supplement their limited specialist management expertise (a missing element of their social position) by recruiting and working closely with high calibre external actors. The broader significance of this mutually supporting relationship between senior lawyers and qualified accountants is examined in more detail in the Discussion and Conclusions.

**Social capital:** The managing partner has highly developed social capital within the partnership (as evidenced by his election to the role by the partnership). The partners generally have established close professional (and sometimes personal)

relationships with their peers and are deeply embedded in the informal networks of the firm. By contrast, the management professional must display considerable social skills to insinuate him or herself into these networks.

“The partnership have grown up sort of man and boy at this firm and many go back to university together. As Head of Business Services you have to be able to come in and work out where the flows are, the very make-up of the partnership, before you can start to really get traction, and start to influence the outcome of the discussions...to bring to bear the full effect of your leadership skills.” (ManPro, Case Study 2)

Numerous management professionals emphasise the difficulties this poses. The following detailed example reflects a common sentiment.

“It took me years to work out but actually it’s vital that you do have a sense of the mood of the partnership because it doesn’t matter how right you are, how good your idea is, the partnership will spit it out....The loyalties...I’ve never had a sense about them. The partners think (about each other) ‘I might have been your trainee and I might have done a really good piece of work for you when you were in trouble as a junior associate’, and they remember that 30 years later...Or there are partners in offices next to one another who don’t speak to each other...because of something that happened 20 years ago.” (ManPro, Study 3, i1)

In time, a long-serving management professional may be able to develop the social capital within the partnership to behave “as if” he or she is an embedded actor whilst remaining external to the partnership. One management professional in our study (one of the first CFO-style appointments in an international law firm) has been in the

firm for 20 years. He has worked with a series of managing partners and serves on the Board. His continuity of tenure has enabled him to develop a high degree of trust among the partners, and incoming managing partners look to him for advice. A similar situation is described by another management professional who has worked with the firm's previous five managing partners. He emphasises that a management professional seeking to expand his or her formal role and informal influence, should not appear to be too closely aligned to a specific managing partner:

“I have always been apolitical which is why I think I have survived so long.”

(ManPro, Study 3, i5).

### **Institution of partnership by the early 2010s: “Sedimented” change**

Looking back on developments in recent years, a management professional in our study summarises these as follows:

“I think what has happened over time is that law firms have changed from being slightly stuffy and old fashioned, (thinking that) lawyers can do everything, to recognising that actually there is quite a lot of merit in somebody else coming to the table and being entrusted to do X or Y...(and) lawyers have let go.” (ManPro, Study 3, i5)

As previously explained, some management professionals in the study now serve on major committees of governance, have access to information not available to the general partners, take a leading role in strategy development, and initiate actions that have a direct impact on the way that partners work. Some also have the right to vote as partners and share in the profits of the partnership (without actually being partners). In two of the firms studied, a few long-serving senior management

professionals were remunerated on the same basis as the most highly paid partners in the firm (i.e. prior to the 2008 recession they were earning more than £1.5 million per annum).

Overall, interviewees report there is a growing acceptance among lawyers in large international law firms operating in the City of London that high calibre non-lawyer management professionals should be involved in running their business and that business services functions should themselves be run as businesses. The causality of this change is complex. In part the appointment of more highly qualified management professionals reflects the changing attitudes to management among the lawyers in these firms. But the appointment of these individuals has also been instrumental in changing lawyers' attitudes. As two managing partners explain:

“(There has been) quite a significant shift in firm culture from a position where management is there to run the partnership for the benefit of the existing partners of the firm, where a lot of people were 15 years ago, to a situation where management is running the business...as a business....We have been working very hard on the lawyers to try to persuade them that we will only become one of the top professional services brands around if we respect the skills of the very highly trained non-lawyers that we have in the building.” (ManPar, Study 3, i14)

“We are in a world now where we need a fusion of skills - of course the lawyer skill is one of the fundamentals in being a successful law firm but it is not the only skill and in some senses, it is not even the predominant skill anymore...effective management is just as important.” (ManPar, Study 3, i19)

In spite of these comments, it is more accurate to describe the partnerships in our study as “sedimented”, in Cooper et al’s terms (1996), rather than “corporatised”, as the lawyers themselves describe it. This reflects Battilana and D’Aunno’s (2009) emphasis that individual actors embedded in the same organisation may respond very differently to opportunities for institutional work. This phenomenon is reflected in the following comment from a senior lawyer and Board member in Case Study 2 who demonstrated the persistence of traditional attitudes to management professionals within an apparently “corporatised” partnership.

“The last time I went to a Management Committee meeting I have to say I thought there were too many non-lawyers on it...This is a law firm. Everybody has a part to play but the most important people, unashamedly so, are the lawyers...The major challenges for us are our clients, and the people who know the clients best are the lawyers. Fees? The people who know best are, guess what, the lawyers. Recruitment, why are we losing our lawyers? Well the people who might know should be the lawyers. So for every essential business decision, the people I believe who know best or have the most information in this area are the lawyers.”  
(Partner, Case Study 2)

## **Discussion and conclusions**

The current study set out to examine how broader shifts in institutional logic are translated, enacted, and influenced by individuals at the micro-level – in other words, to respond to calls to explore the micro-dynamics of institutional work (Battilana and D’Aunno, 2009; Lawrence et al, 2009). The central question guiding the analysis was: *how have managing partners and management professionals jointly engaged in institutional work within professional partnerships?* The study focused on the field of

large international law firms operating in the City of London and explored the process of institutional change represented by the “corporatisation” of these partnerships.

To date the role of management professionals in professional partnerships has been largely neglected by scholars of professional service firms. The current study has demonstrated how they can play a central role in the process of institutional change. By focusing on these individuals’ accounts of organisational change within professional partnerships (as supported and amplified by the accounts of the managing partners who work alongside them) the current study has given a voice to this previously marginalised but now increasingly significant occupational group.

The current study has identified the concrete practices and specific actions employed by individual actors within the study (the managing partner and management professional) as they work to bring about the professionalisation of management within their firms. Their activities encompass operational, organisational, and strategic change. *Operational change* is within the direct remit of the management professional. Specific actions in the current study include: upgrading the quality of business services staff and centralising authority within the business services function. To bring about *organisational change* the management professional may first need to convince the managing partner to co-operate. Specific actions in the current study include: strengthening the system of partner performance measurement and management, and outsourcing elements of the provision of legal services. *Strategic change* begins with the management professional working closely with the managing partner to devise a new strategy and continues as they build the support among required to implement these changes. In the process the

current study, which represents one of the first detailed empirical studies of institutional work, has made four contributions to the developing body of theory in this area.

First, the study has *identified the dyadic relationship* that develops between the managing partner and management professional. In other words the study is not concerned simply with the actions of individual institutional workers but with their interactions (and therefore responds to calls by Lawrence et al, 2009, to explore the phenomenon of distributed agency in institutional work). The study demonstrates how this dyadic relationship between these two different types of professionals represents a key mechanism of institutional work in this context. It suggests that the dynamic interaction of the management professional and managing partner reflects the different sources and relative strengths of their social position. By working together they are able to overcome the limitations of each other's social position. The study has highlighted the significance of the interaction of formal authority as well as social capital but, unlike previous studies of institutional entrepreneurship, the study gives equal prominence to a third dimension, *specialist expertise*, as a necessary component of social position when seeking to mobilise allies around organisational change.

Second the study has *examined the micro-dynamics of this dyadic relationship*. It has identified the processes of creating and developing the dyad, collaborating within the dyad, challenging and exploiting the dyad, expanding beyond the dyad, using the dyad for mutual support and, ultimately, evolving the dyad. The emphasis reflects recent articulations of institutional work which have highlighted the need to develop a

deeper understanding of the distributed nature of agency and to focus on a supra-individual level of analysis concerning what people do together (Hallet, 2010). This dyad can be understood at two levels: the dynamic interactions between two individuals (managing partner and management professional), and between two professions (law and accountancy). The latter dynamic will be explored later in this final section of the paper.

Third, the study has demonstrated the importance of *combining micro-level analysis of the dynamics of distributed agency with a macro-level analysis of field level change*. This emphasis reflects calls by Battilana and D'Aunno (2009) and Lawrence et al (2011) for a multi-level analysis of institutional work. The model of the dynamics of institutional work developed for the study emphasises that broader shifts in logic may be observed at field level but are translated, enacted, and influenced by individuals engaged in institutional work within their organisations. These individuals in effect act as a filter, first recognising field level developments and then translating and enacting the changing institutional logic within their specific organisations. In the process, they in turn help to shape the institutional logic. In other words, this study has emphasised the recursive relationship between individual actors and institutions. As previous studies of institutional change have suggested, if such changes prove effective, mimetic pressures ensure that other actors within the field adopt these changes within their own organisations as they gradually diffuse and become embedded at an institutional level. Through this process, this study emphasises, the management practices initiated by a select number of managing partners and management professionals engaging in institutional work have gradually diffused across the institutional field. It is important to recognise that these changes have not

disseminated widely across the legal profession as a whole and there is still some variation even within the field of large international law firms. The City-based executive search consultants interviewed for this study who specialise in recruiting management professionals for law firms emphasise that there is still considerable variation in the roles, status and rewards available to management professionals. They report that the first large international law firms to recruit senior management professionals continue to look *outside the legal sector* for fresh talent, whereas those law firms who have been slower to “professionalise” management now brief executive search consultants to find management professionals with experience of working *inside a law firm*. Thus executive search consultants have themselves become agents of institutional change by helping to diffuse the “professionalisation” of management across the institutional field of large international law firms.

Fourth, and finally, the study demonstrates how a micro-level study of dynamics of distributed agency can reflect *macro-level institutional processes*, specifically a higher level boundary meeting of two professional projects: law and accountancy. It can be argued that the institutional field of large international law firms is embracing corporatisation to further its professional project (Ackroyd and Muzio, 2007) but the current study goes further. As the most senior management professionals in our study are typically qualified accountants, their individual level actions can be viewed as indicating a competing professional project: the incursion and colonisation by members of the accountancy profession of a specific part of the legal profession, i.e. large international law firms.

As suggested earlier in the paper, the management professionals in the study utilised the mechanisms identified by Suddaby and Viale (2011) by which professionals bring about change at the institutional level. First, they used the legitimacy conferred on them through their professional accountancy qualifications to challenge the incumbent order (i.e. that lawyers are best-qualified to manage law firms) and to define a new space. They brought their experience of financial and business management to a field which had previously relied upon “amateur” managers. In so doing, they gradually established acceptance within large international law firms that management professionals could play a central role in the management of these firms, and created a new occupational group: management professionals with specialist expertise in law firm management. In so doing the management professionals used their social capital and skill to populate the field with new actors. Their social capital in this context derived primarily from their specialist expertise. Reflecting Fligstein’s (1997, 2001) emphasis on the importance of social skills in the context of institutional entrepreneurship, the individuals also demonstrated considerable skill in judging the appropriate pace and sequence of change and in building coalitions amongst the partnership to ensure that the changes were ultimately adopted by the partnership. In the process they were helped to introduce new rules by establishing management systems which constrained the autonomy of the partners and by bringing in senior management professionals to work alongside partners in key areas such as business development, knowledge management, strategy development, and human resource management. Finally, the management professionals were able to manage the use and reproduction of social capital to confer new status and social order within the field. This is demonstrated by those management professionals who have developed positions of considerable influence

within certain large international law firms, and who have obtained many aspects of the formal status and rewards commensurate with, and in some respects superior to, equity partners in the firm.

The study highlights a number of potential future areas of research, beyond the obvious need to extend and develop the concept of the institutional work dyad and examine the actions and interactions of members of the dyad in other institutional contexts. For example, to what extent do Suddaby and Viale's (2011) mechanisms of institutional work apply to management professionals who are not from the accountancy profession and who lack the legitimacy associated with a relatively high status professional qualification? It would be interesting systematically to compare the experiences of different kinds of management professionals (e.g. in HR, marketing, IT etc.) in law firms to see if there is any recognisable variation in their experience. This phenomenon of professional boundary work merits further research in this context. The Legal Services Act has enabled non-lawyer management professionals to become law firm partners. Future research could focus on management professionals admitted into law firm partnerships to examine the impact this has on their social position. Research across professional sectors could explore the factors that influence the sequence and pace of diffusion of management practice across professional fields, and why other professional sectors may have been faster or slower to adopt professionalised management. As management professionals take on an increasingly significant role within professional partnerships there is value in exploring the impact they have had on the nature of professional work within these firms and the potential implications for concepts of professionalism within this context

In the wake of the Legal Services Act the current study has potential managerial implications. As private equity firms and other external investors take advantage of the newly created opportunity to buy substantial stakes in law firm partnerships in the UK, they can learn from the example of the pioneering management professionals and managing partners in this field. The study suggests that to achieve successful change in large international law firm partnerships, external agents should be aware of the limited authority of managing partners, be alive to the historical prejudices against non-lawyers and “fee-burners” in the area of management, have the requisite social skills to build coalitions with lawyers in key management roles, and proceed cautiously and systematically when seeking to introduce “professional management”.

<sup>1</sup>Throughout this paper the single term “managing partner” is used when referring to the partner with overall executive responsibility for managing the firm. Some law firms in our study use other terms. For example, in some the term senior partner is used (though more typically in law firms this term describes the individual with a more externally-facing role akin to that of a chairman in a corporation). Sometimes the term chief executive or CEO is used, though in other firms in our study this term is applied to the most senior non-lawyer management professional reporting to the managing partner. The lack of standardisation in the terms used for management roles in large international law firms reflects the evolving nature of management structures in this institutional field.

<sup>2</sup> The term “management professional” is used in this paper to describe the non-lawyer senior manager who has overall responsibility for business services functions (e.g. Finance, IT, HR, and Marketing). The titles of these individuals vary considerably between firms, reflecting the evolving nature of their roles. Typically he or she is called “COO” or “CFO” (or some variation such as “Director of Finance”). Occasionally he or she is called “CEO”. This senior management professional may have direct responsibility for all business service areas. Alternatively areas such as HR and Marketing may be run by specialist Directors of Business Services who report to the COO/CFO.

<sup>3</sup> *Legal Business* and other leading practitioner journals regularly publish regular law firm rankings classified under various headings: including Top 10, 50 and 100. The focus on the Top 25 in this study reflects the fact that, in recent years, there has been an increasing divide in terms of scale, revenue, and profitability between the more rapidly growing upper quartile and remainder of the Top 100 (*Legal Business*, December 2009). In 2009 the Top 25 generated total revenues of £10bn compared to total revenue of £3.7bn generated by the remaining 75 firms in the Top 100. The composition and revenue generated by the Top 25 remained largely unchanged in 2010 (*Legal Week*, 21 July 2011)

<sup>4</sup> [To add details of two ESRC funded research studies when paper no longer anonymised]

<sup>5</sup> All the firms in our study variously appear as top 20 firms in a range of corporate and commercial, and finance categories in *The Legal 500* (2010) rankings of law firms. All firms described themselves on their websites as “global” or “international” law firms and operate in the City of London.

<sup>6</sup> All of the managing partners in the firms we studied were male – as were most of the management professionals we interviewed. For the sake of linguistic simplicity we have used the male pronoun when referring to the managing partner in the abstract and both male and female pronouns interchangeably when referring to the management professional.

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