Client Development Coaching for Young Partners

Most lawyers my age never had coaching on client development when they were young partners. So, naturally many ask why it is important for young partners now. There are several reasons. First, developing business now is way more challenging than it was 25 years ago. The competition is greater, client expectations have increased and the time available for business development has decreased. Second, many young partners are in the transition stage of their career where they are moving from being solely service providers to being responsible for building client relationships and developing new business. For many, to the extent there is any effort at all, it is unstructured, unfocused and ultimately unsuccessful. They procrastinate, they are undisciplined, they have no plan and ultimately little or no execution. Mentors within the firm can balance the current situation with both institutional firm knowledge and their own experience, but they do not have the time to focus on the business development of more junior partners. This program is designed to assist young partners in their client development, providing both a benefit to themselves and to their firm. Like working with a fitness coach, participants will learn what activities will provide the greatest benefit to them and then will have regularly scheduled sessions with the coach to report on activities and learn more. As discussed below in this program, young partners will:

- Develop a Business Plan
- Determine both group and individual goals that will challenge and stretch them
- Determine what activities to undertake to meet their goals
- Learn how to write articles and give presentations that will enhance their reputation and increase their chances of getting hired.
- Develop a Focused Contacts Plan
- Become more client focused
- Be held accountable

Program Success

The client development coaching program involves both group activities and individual one-on-one sessions. It involves both teaching-giving the right answers and coaching-asking the right questions. The program is tailored both to what makes the firm unique as well as what makes the individual partners unique.

The two main criteria for program success are selecting the right people to participate and having the support of firm leadership. Young partners selected should have a strong desire to develop business, expand client relationships and develop their reputation. They should be open to coaching and trying new ideas. They should be comfortable getting outside their comfort zone. Second, to be successful, firm leadership must support the program and ensure it is supported by lower level leaders in the firm. In this way it can be a win-win for the selected lawyers and for the firm.

1. Purpose
Firm leaders need to clearly articulate the purpose, focus, or mission of the project and it must be aligned with the participants' personal wants and needs. This might include providing maximum opportunities for them to develop their individual practice and to work synergistically as a team.

2. Challenge
Participants need to set challenging individual and team goals that stretch them.

3. Camaraderie
Participants should feel like a team, get to know each other well, learn from each other and think synergistically.

4. Responsibility
Participants must take responsibility for their success.

5. Growth
The program should include learning and growth. If participants feel they are moving forward, learning new concepts, adding to their skill base, and stretching their minds, motivation will remain high.

6. Leadership
Firm leadership must create an environment for participants to motivate themselves and to execute their plans

Structure

The program, which usually lasts 18-24 months, is structured to include both team activities and learning and individual one-on-one coaching. Workshops on client development without the follow-up of one-on-one coaching usually do not provide the benefits. The first step is for the coach to get to know the firm and the participants. That is accomplished both by a visit and by the participants filling out a questionnaire describing their practice, their client development activities, their strengths, weaknesses, opportunities and threats (SWOT analysis).

Next, a mini-retreat is held to introduce the program. The retreat is usually a dinner followed by a half day workshop the next day. The workshop includes group goal setting, list of activities for the group and individuals to undertake to meet the group goals, creation of individual business plans, goal setting, time allocation, teaching and discussion on reputation building and relationship building, discussion of the focused contacts concept and discussion of what will follow. The first one-on-one coaching can also take place at the retreat site.

Thereafter, coaching sessions occur by telephone once a month and in person once a quarter. Again, like the fitness coach, part of the coaching session will go over activities the participant has done since the last session and plans for the next month. Some participants email the coach each Friday a list of what they have done that week and what they plan to do the next week. They find reporting weekly forces them to execute or risk being embarrassed for having done nothing.

If opportunities present themselves for further group sessions, such as during a partners' retreat or if all the participants are in one office, then additional group sessions are held. During the additional group sessions participants report to the group on what they have done and what has been successful.

Some firms create a team extranet. Among the many materials posted to the extranet are "best practices" in categories selected by the participants. In other words when a participant makes a connection with a client, publishes an article, goes to a networking event, or speaks at a conference, she can share what worked.

Testimonials from Firm Leaders and Participants

Firm Leaders:

"I am particularly pleased with the feedback I received from several of the participants on Friday afternoon. Thank you for taking us on."

"Cordell, we all thought you did a terrific job and we are already thinking about how we can use you to help us further. Thanks very much."

"I want Cordell on our team."

Participants:

"Cordell, I'm most appreciative of your time and dedication to helping each of us maximize our potential. I also just enjoyed getting to know you, talking football and such. That helped alleviate the "awe" factor I had before meeting you. If I can learn one-tenth of what you know (and actually execute), I'll be in great shape."

"I think what lawyers often lack is inspiration. As a true coach, that is what you deliver. I really appreciated the time you took to hone in on the issues in my plan and more importantly, my personality, to identify where I need to exercise the most discipline and build the right habits. I am looking forward to "stretching" and knocking down a few walls in the process."

"Thanks, Cordell. I enjoyed our session as well and my head has been swimming with ideas since then. Your advice was right on the money and I really appreciate it. Now to make it happen...."

"I only regret that we didn't have the whole day with you as I believe it would have been very beneficial."

“I actually prepared my annual personal plan before the sessions, but as a result of your sessions I feel that I need to revise (my goals aren't focused or readily quantifiable).. I plan on revising it sometime this week and would love to send you a copy!!! (I'll blackline it to the original draft so that you can see the changes I made as a result of your presentation).”