

THE  
LAW FIRM LEADER'S  
REFERENCE GUIDE  
FOR

# CREATING A BUSINESS DEVELOPMENT CULTURE

*A Checklist of Best Practices for  
Enhancing Client Loyalty, Revenue,  
Profitability and Growth*

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 Law Firm  
**CultureShift**<sup>®</sup>  
Catalysts for Transformation

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## INTRODUCTION

### LEADING A CULTURESHIFT®

As a law firm leader, you are responsible for creating a high performance firm, and in this guide, we will focus on one major sub-set of your duties – effectively blending people, processes, training and technology to create a client-focused culture that maximizes your firm’s revenue and profitability.

As you well know, establishing such a culture is no easy task. Your impassioned speeches about increasing cross-selling, delivering higher levels of client service, becoming more profitable and generating higher originations are not enough. You must overcome significant roadblocks, such as silo mentalities, weak implementation, underdeveloped leadership skills, poor cross-selling, inadequate communication, misaligned compensation, uneven client service, unmotivated and untrained lawyers, and dysfunctional groups. Reaching into your Leadership Toolkit, you must:

- Change behaviors
- Conduct collaborative planning
- Revise systems
- Enhance skills
- Increase teamwork
- Employ supportive technology
- Align incentives
- Inspire colleagues

Without the right culture, you risk a future where you may lose clients, star lawyers, revenue and profitability. To thrive, firms need a champion, a strong leader with the ability to encourage the right behaviors. Who better to fulfill that role than you, a law firm leader?

As a leader, you are the master architect, the grand puppeteer who must pull the right strings to get the right people moving in the right direction. While the buck(s) start and stop with you, few leaders are trained in the art of effectively managing the vast array of marketing, selling and client service initiatives that must blend effectively to create a client, revenue and profitability-focused culture. In addition, most leaders do not have the time to read and distill information from hundreds of books, articles and blogs relating to sales management for lawyers. To help you overcome this gap, I created this guide as your playbook, your checklist of powerful approaches to unleash, focus and sustain a higher level of rainmaking activity.

## YOUR NEW WORLD

In our new hyper-competitive marketplace, the next generation of leaders must get lawyers in their groups to increase client loyalty and generate profitable growth. To succeed, these leaders must learn how to create an internal environment that attracts and retains a steady flow of valuable engagements.

Firms often talk about creating a culture of business development, but in truth, culture exists more by default than design. In many firms, historical events, powerful leaders and oversized partner personalities influence behavioral norms more than an intelligently crafted strategy. Ingrained over years (if not decades), these patterns ossify into habitual ruts that undermine the firm's ability to maximize its potential.

## HOW TO USE THIS GUIDE

Almost every leader I've spoken with says creating a vibrant culture of business development is a top priority. The multi-million dollar question is: how can you accelerate this process? By using some of the techniques suggested in this guide, leaders at all levels can significantly increase the quality and quantity of marketing, selling and client service activity within their groups and throughout the firm. While every technique contained in this guide may not apply to all leaders, you will likely find approaches that can make a significant difference for the groups you lead.

This guide does come with a warning – the sheer volume of activities listed here can feel overwhelming so please start small. The following are suggestions for turning this information into productive action:

- When specific issues and opportunities arise, refer to this guide for ideas on how to respond
- Share this guide with other firm leaders, and have them respond to the “Potential Revenue from Major Initiatives” exercise and “Action Challenge” questions at the end of this guide
- Choose two or three key areas to address
- Develop consensus on what must be done to reach the next level of performance in those areas
- Delegate ownership and responsibility for each area
- Implement, implement, implement

- In future years, reinforce what you have implemented, and tackle one or two new areas

One additional thought about implementation – assume nothing will happen unless YOU make it happen. One of the most important roles you can play is that of the “[Watcher](#)”, someone who provides pats on the back while holding feet to the fire. As a leader, you are also the Chief Motivation, Tracking, Reminding, Convincing, Accountability, Implementation, Measuring, Communication, Cheerleading, Nagging, and Carrot & Stick Officer, and this guide will share techniques to support you in these activities.

## CLOSING

The most successful law firms of the future will live and breathe service, sales and marketing. Victory will come to the early adopters, the proactive front-runners who have the organizational courage, discipline and backbone to replace inefficient old approaches with superior high performance behaviors.

Science fiction writer William Gibson put it well when he said “The future is here—it’s just not evenly distributed.” As a law firm leader, you must see the future and get your firm there ahead of your competitors. As the catalyst who sets the wheels in motion, you must rally your lawyers, professionals and staff to work together to develop new skills, new systems, new behaviors and new disciplines, all in pursuit of creating an organization in sync with the future of our profession.

My fervent hope is that this guide serves as a trusted companion on your journey. If you have any comments or additional content to add to this guide, I welcome your feedback and input.

## ABOUT THE AUTHOR



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David H. Freeman, J.D., is Chief Transformation Officer at Law Firm CultureShift® and CEO of the David Freeman Consulting Group, an organization that has shown thousands of managing partners, group and department leaders, partners, counsel, laterals and associates in hundreds of law firms worldwide how to develop more and better business. For two decades, he has worked with over one-third of the AmLaw 200, and for the past three years he was recognized as the “Best Law Firm Business Development Consultant and Coach” in National Law Journal surveys.

David is the creator of [CultureShift®](#), a strategically phased series of initiatives designed to get firms actively focused on increasing revenue, growth and profitability. Key elements of the process include:

- Developing business development management skills in leaders
- Enhancing selling skills for key lawyers
- Increasing cross-selling
- Providing client service training and planning
- Conducting productive collaborative planning and action-oriented retreats
- Soliciting and acting upon client feedback
- Developing client and industry teams
- Improving lateral integration
- Succession planning
- Instituting tracking and implementation systems

David is the author of the acclaimed book: [Secrets of the Masters: The Business Development Guide for Lawyers \(see reviews here\)](#), and he has also written a unique workbook for law firm leaders called Weekly Reminders for Revenue-Focused Leaders. He is co-author of Law Firm Marketing Leaders: Tips from a Collection of Experts, and he is a highly rated speaker who presents at law firm retreats, law firm networks, bar associations, law schools, and international, national, and regional law firm leadership conferences. He has written dozens of articles on the client and revenue-related aspects of management, leadership, service, strategy, and business development for many of the major legal publications.

David produces [practical video tips](#) focused on leadership and business development. He has also created a unique business development assessment tool for law firms called [Culture Xray®](#). For a [full bio click here](#). David may be reached at [David@LawFirmCultureShift.com](mailto:David@LawFirmCultureShift.com) and 949.715.0819.

## CULTURESHIFT® AREAS OF INFLUENCE

### ACCOUNTABILITY

- » Create accountability groups
  - Buddy system
  - Practice groups
  - Industry or client teams
  - Offices
  - Associate marketing committee
- » Track activity
  - Make actions (or inaction) of lawyers transparent to others
    - Report on progress at group meetings
    - Develop project management spreadsheets, visible to all that show whether people are on time acting on their commitments
  - Debrief and plan next steps
- » Establish [Watchers](#) who are responsible for managing and driving activity
- » Arrange contests to motivate desired behaviors
  - If lawyers achieve certain goals, they qualify for some prize (e.g., two or more on-site client visits in a month qualifies for a chance to win a dinner for two at the finest restaurant in town)

### ALTERNATIVE FEE ARRANGEMENTS

- » Develop fee approaches based on the expressed needs of each client (for examples of approaches, see [ACC Value Challenge](#))
- » Target practice areas that lend themselves to generally predictable tasks
- » Use firm financial data to make pricing decisions
- » Pilot new fee arrangements with truly committed clients
- » Adapt compensation system to properly reward your lawyers for using innovative and successful fee structures

### ANCILLARY SERVICES

- » Offer services that can generate standalone revenue and/or serve as a feeder to attract new legal work
  - Fee based training
  - Consulting services, lobbying, etc.



**ALUMNI OF THE FIRM**

- » Conduct exit interviews
- » Help departing lawyers find new positions
- » Maintain strong relationships with departed lawyers
  - Assign lawyers to stay connected with key alumni
- » Offer value to firm alumni
  - Communicate job openings
  - Conduct alumni events
  - Facilitate networking

**BOARD/MANAGEMENT COMMITTEE MEETINGS**

- » Facilitate alignment, consensus and decision-making on key issues
- » Create a firm-wide vision and conduct firm-level strategic planning
- » Create written job descriptions to develop role clarity for all leaders
- » Develop agreement on standards of behavior and policies for enforcing standards

**BRANDING**

- » Identify the major characteristics that differentiate your firm/group
- » Get lawyers and staff acting in alignment to reinforce the differentiators, and train them to become comfortable communicating the differentiating message to the marketplace
- » Communicate these differentiators to targeted clients, prospects and referral sources

**BUDGETING**

- » Create budgets that fund important business development and client service activities
  - Prioritize activities that focus on clients, former clients, referral sources and alumni
  - Emphasize activities that yield face-to-face contact
- » Create urgency to increase revenue at the Group, Department and Office level
- » Drive groups to manage their budgets and debrief to assess ROI

- » Require reporting on discretionary spending such as client entertainment

### **BUSINESS DEVELOPMENT COMMITTEE**

(lawyers overseeing lawyer activity)

- » Address the full range of key business development activities - marketing, selling, client service
- » Focus lawyers on visiting their best clients, prospects and referral sources
- » Drive implementation of initiatives - [Watcher](#)

### **BUSINESS DEVELOPMENT TRAINING AND PLANNING**

- » Improve the rainmaking skills of your lawyers
- » Create a business development training curriculum scaled to the needs of partners, income partners/of counsel, laterals and associates
  - Offer training/coaching for your highest potential lawyers first to build momentum for the program
- » Ask for tactical individualized plans from partners and senior associates that align with group/firm goals
  - Plans should be based on their experience, needs, goals, passions, skills and personality
- » Place significant focus on highest potential returns (e.g. current client, former clients, referral sources)
- » Provide ongoing refreshers/reminders
  - Presentations by your firm's rainmakers
  - Discussions at partner meetings
  - Bring in consultants and trainers
  - Conduct client presentations
  - Create a business development book club
- » Provide business development [mentoring](#)
- » Develop clearly defined business development [measures](#)

### **CLIENT FEEDBACK AND ACTION PLANNING**

- » Identify high priority targets
  - Top firm clients

- Top group/department clients
- Top clients for each partner
- » For strategically important clients, overcome partner reluctance and make feedback mandatory
- » Schedule meetings and conduct live visits
- » Learn from clients how to make working with the firm an exceptional experience
- » Seek opportunities to provide additional value/services
- » Offer to conduct joint planning sessions with major clients
  - Conduct end-of-year reviews to determine plans for the following year
- » Require action plans from your responsible lawyers and track follow-up from feedback
- » Form teams for major clients

#### **CLIENT SERVICE TO ESTABLISH LOYALTY**

- » View [client protection and growth](#)
- » Provide client service training for lawyers and staff
- » Establish client service standards
- » Develop checklists to support adherence to the standards
- » Train leaders to get group members to act in alignment with the standards
- » Institute specific client service initiatives and track results
- » Focus lawyers on engaging in activities that move relationships from client satisfaction to client loyalty
  - Become more highly responsive
  - Proactively offer advice and services to help prevent issues from arising
  - Provide internal training
- » Identify high priority clients to receive greater attention
  - Develop key client teams
  - Identify at-risk clients and develop plans to repair the relationship
  - Task senior leadership to review action plans and progress
  - Conduct joint planning sessions with top clients
- » Encourage staff to create a client service committee to develop their

- own standards and best practices
- » Enhance internal levels of service between partners, associates and staff
- » Align incentives and compensation to encourage desired client service behaviors

#### **CLIENT TEAMS**

- » Develop plans to increase loyalty, grow work and generate referrals
- » Elicit feedback, anticipate needs, provide exceptional value and customize service to each client's specifications
- » Stay current on issues relating to the client's business and industry
- » Establish a client relationship point person for each major client
- » Build relationships in other parts of the client's organization
- » Introduce new firm members to the client before needs arise
- » Build high performance [teams](#)
- » Encourage regular communication among core team members
- » Require reporting to senior management on implementation of team plans

#### **COMMUNICATION**

- » "ABC" = Always Be Communicating ([Watch Video](#))
- » Err on the side of over-communicating internally - send strategic messages many times in many different ways
- » Provide constant internal reminders of the brand, vision and key strategies
- » Be an internal cheerleader - widely celebrate/reward/praise progress and successes in alignment with plans
- » Get key people/groups to interact and communicate with each other to identify opportunities
- » Build consensus around important client development initiatives
- » Use tracking/measuring of key initiatives as a way to communicate the importance of those areas
- » Fill in information gaps - people assume the worst when there is silence surrounding an issue
- » Constantly communicate the team-based/client-focused aspects of the

- compensation system
- » Regularly communicate desired cultural expectations relating to client and business development
- » Communicate by being a role model for desired behaviors

### COMPENSATION

- » Align with strategy to motivate desired behaviors and outcomes
  - Compensate for client service, cross-selling, giving work to others, mentoring and team-based behaviors
- » Provide psychic compensation - deliver high levels of recognition and praise in addition to financial rewards
- » Provide compensation that motivates your lawyers to offer alternative fees
- » Clearly and frequently communicate how compensation rewards desired behaviors
- » See [related article](#)

### CROSS-SELLING

- » Watch [cross-selling video](#)
- » Reframe cross-selling to a more client focused approach of “cross-serving”
- » Encourage and measure action between complementary group leaders
- » Facilitate greater interaction between complementary practice groups, departments and offices to build higher levels of trust
- » Encourage cross-group education to learn more about their respective practices and client opportunities
- » Provide cross-serving training and develop specific action plans for top targets
- » Create a culture of lawyers giving (as compared to asking for) cross-serving opportunities as a way to encourage faster action
- » Understand the importance of making it easy for relationship partners to make introductions
  - Help them look good to their clients
  - Identify client’s needs
  - Provide contexts for making an introduction

- Build relationships and trust with clients in advance of their needs
- » Communicate cross-services to clients
- » Establish [Watchers](#) to drive ongoing activity
  - Create a cross-serving implementation task force
  - Keep cross-serving initiatives top-of-mind and track progress on implementation
- » Adapt compensation system to encourage cross-serving behaviors

## CULTURE

- » Goal is to unleash, focus and sustain business development activity throughout the firm
- » Identify key culture-killing behaviors to address ([see video](#)):
  - Low motivation
  - Siloed practices
  - Dysfunctional groups
  - Lack of trust
  - Inefficient teams
  - Untrained leaders
  - Poor communication
  - Misaligned compensation
  - Underdeveloped selling skills
  - Unclear goals and measures
  - Inconsistent client service
  - Inconsistent service to other firm lawyers
  - Minimal accountability
  - Inadequate follow-through
- » Encourage people to fulfill their career aspirations
- » Help partners develop a greater awareness around what it means to be an owner in a law firm
  - Conduct a roles and responsibilities exercise to define what must be done, and who must do it
- » Establish a culture of coaching within the firm
- » Enhance levels of [engagement](#) to the firm and between lawyers and leaders
- » Utilize a visionary style of leadership to communicate a clear picture of

a desired future

- » Increase lawyers' professional skills
- » Encourage a sense of humor
- » Celebrate and recognize progress and success in alignment with the strategic plan

#### **DATA DRIVEN DECISION-MAKING**

- » Utilize business intelligence to help you find opportunities and avoid risks
  - Market data
  - Competitive data
  - Internal data
    - Focus on growth and profitability
    - Analyze and manage key client relationships
    - Study:
      - Changes in client performance - are key clients growing, shrinking, etc.?
      - Uncover cross-selling opportunities
      - Alternative fee practices
      - Legal project management
      - Marketing and firm brand data
- » Include useful data in the strategic planning process

#### **DELEGATION**

- » Identify key business development roles and responsibilities
- » Senior leaders take key responsibilities and delegate other tasks, which can result in greater action, ownership and buy-in throughout the firm
- » Identify co-leaders or deputies where necessary to reduce the burden on a single leader
- » For potential future leaders, find tasks that will provide training and refine their leadership skills

#### **DIVERSITY**

- » Match up to your top client's diversity profile where possible
- » Understand clients' values (and compensation) as relates to working

with diversified teams in law firms

- » Overcome unconscious bias and include diverse lawyers on client teams and new pitches
- » Share credit and work among diverse team members
- » Utilize the varied approaches/perspectives of your diverse team members to make better decisions

### **DYSFUNCTIONAL GROUPS/PEOPLE**

- » Reduce interpersonal conflicts that block higher performance in groups and individuals
  - Provide training on personality and communication styles
  - Get people working together to build rapport and reduce negative perceptions
- » Demand action plans for improving key relationships
  - Utilize conflict resolution techniques
  - Track progress
- » Identify inefficient/destructive organizational habits and develop plans to correct them

### **ENGAGEMENT**

- » Enhance engagement levels of lawyers and staff to yield higher performance
  - Encourage better relationships between lawyers and their immediate leaders
  - See [12: The Elements of Great Managing](#), by Rodd Wagner and James K. Harter
- » Gain the “permission” of your lawyers to be led by your leaders
- » Obtain agreement on group standards and enforcement
- » Distribute leadership responsibilities widely
- » Involve associates in selected decision-making and leadership



## IMPLEMENTATION

- » Watch [implementation video](#)
- » Develop consensus where needed to gain buy-in and engagement
  - Utilize collaborative planning
- » Create business development champions by engaging partners/influencers to lead key initiatives
- » Create a sense of urgency to overcome inertia
- » Seek fast wins to motivate ongoing implementation
- » Break plans into manageable action steps - don't take on too much!
- » Support swift and decisive decision-making in groups and teams
- » Tie accomplishments to compensation system
- » Provide recognition for implementing desired business development behaviors
  - At partner meetings or retreats
  - Praise in internal newsletters
- » Utilize project management techniques
- » Develop transparent tracking and follow-up
- » Institute an "Implementation Task Force"
  - Ask partners and staff from various offices and practices to act as [Watchers](#)

## INDUSTRY GROUPS

- » Build around a core team of highly motivated lawyers
- » Target specific clients, prospective clients, referral sources and influencers
- » Assign industry group members to build a presence in key areas of the market
  - Write articles for targeted trade publications
  - Contribute to targeted social media
  - Attend key conferences
  - Speak at conferences or on webinars
  - Offer internal training for key potential clients
- » Adapt compensation systems to reward team-based contributions

### **INNOVATION AND CONTINUOUS IMPROVEMENT**

- » Explore new ways to deliver services and work with clients
- » Make the business case for change by incorporating “the voice of the client”
  - Utilize results from client surveys, industry research, etc.
- » Assign change champions and track progress
- » Strategically utilize outsourcing

### **LATERAL ACQUISITION AND INTEGRATION**

- » Study firm financial data to identify high profitability/differentiation areas for lateral growth
- » Institute firm-wide initiatives to get your lawyers to identify attractive candidates
- » Clarify criteria to determine proper cultural fit
  - Personality and interpersonal skills
  - Business development skills
  - Team orientation
- » Conduct due diligence beyond work done by recruiters
  - Ask for best case, medium case, and worst case projections of their books of business
  - Conduct competitive intelligence research to assess the strength of their relationships with their clients
- » Gain cross-practice endorsement of the candidate
- » Offer compensation packages in alignment with other firm lawyers
- » Integration
  - Firm roles
    - Develop a business plan containing clear mutual expectations and measures
    - Assign a lateral mentor
    - Check-in with new laterals
      - Reach out periodically to get their feedback on the integration process; learn what you can do to assist if needed
    - Encourage relationship-building with key firm lawyers
    - Build connections between laterals

- Invite new laterals to work with firm lawyers on firm matters
- Facilitate introductions to targeted firm clients before they need that lateral's expertise
- Include laterals in pitches and marketing initiatives
- Provide marketing support
- Provide training and coaching where needed to enhance their selling skills
- Lateral roles
  - Develop a tactical business development plan
  - Introduce their clients and contacts to firm lawyers
    - Have firm lawyers offer value-added services to establish connections and rapport
  - Actively seek out and nurture internal relationships
  - Contribute to efforts that grow the group/firm

#### **LEADERS (DEPARTMENT, GROUP, OFFICE, NON-ATTORNEY)**

- » Provide training to teach leaders how to encourage highly productive business development activity
- » Choose leaders who possess the right skills and attitudes for driving business development
- » Provide clarity on business development related roles, responsibilities and authority
- » Solicit leader's input when determining group member's compensation
- » Align your leaders around a common vision, mission, values and key strategies
  - Have leaders communicate the vision, mission, values and key strategies back to their respective groups
- » Develop a group culture that encourages client activity
  - Conduct group meetings focused on business development, require action and track results
- » Utilize specific leadership styles based on the needs of the group and individuals ([see leadership styles video](#))
  - Specifically focus on the coaching style of leadership ([watch coaching style of leadership video](#))

- » Provide leadership coaching as needed
- » Get leaders to create solid, actionable group plans
  - Design to improve client service, selling and marketing behaviors
  - Drill down to strategies, priorities, tactics, timelines, accountability, goals and measures
  - Assign “deputies” who are accountable for managing implementation of key elements of group plans
- » Have group leaders meet regularly
  - Conduct an annual off-site training, strategy and planning session
  - Conduct other meetings during the year, share best practices, encourage mutual accountability and track progress
- » Encourage cross-office and cross-group collaboration
- » Establish measures relating to leadership progress and success
- » Have leaders act as [Watchers](#) to drive ongoing implementation in their groups
  - Tracking, measuring and reminding for accountability
- » Have non-lawyer business functions identify ways their departments can support business development
- » Create “starter” leadership roles for up-and-coming future leaders

#### **LEGAL PROJECT MANAGEMENT**

- » Identify practice groups/department that could benefit from a project management approach
- » Speak to clients to learn what other firms are doing and what they would like to see
- » Get the entire group to work together to develop processes to reduce the cost and increase the speed and quality of delivering services
- » Develop alternative fee structures in alignment with these new approaches

#### **MARKETING/BUSINESS DEVELOPMENT DEPARTMENT**

- » Solicit these department’s input on how to accelerate business development action in the firm
- » Clearly define goals and measures for the department
- » Visibly promote and support their initiatives

- » Consider using marketing professionals to generate new client opportunities
- » Support initiatives that get lawyers physically meeting more clients and building personal relationships
- » Benchmark department structure and expenditures against best practices at other firms
- » Provide sufficient resources, staffing and/or technology for:
  - Branding/developing marketplace visibility
  - Targeting through research
  - Establishing a sales pipeline process
  - Following up on business development leads
  - Delivering high levels of client service
  - Coaching and training attorneys
- » Include senior marketing/business development staff in leadership team meetings
- » Conduct daily or weekly check-in meetings with senior marketing/business development staff

## MEASURES

- » Develop measures of progress as well as measures of success
- » Examples of success measures
  - Profitability
  - Growth
  - Revenue
  - Hours billed
  - Realization
- » Examples of progress measures
  - In-person and on-site meetings with clients, prospects, former clients and referral sources
  - In-house presentations to clients, potential clients, and referral sources
  - Internal cross-selling meetings
  - Cross-selling pitches
  - New relationships built inside client organizations with other decision-makers and influencers

- Introductions of clients to other firm lawyers
- Size of key networks
- Referrals given and received
- Frequency of communication tools used to reach target audiences
- Business development initiatives completed by leaders and individual lawyers
- Delivery of extraordinary levels of client service
- Client feedback received
- Articles/speaking engagements delivered
- New targeted organizations joined
- Leadership positions taken in targeted organizations
- Lawyers who travel to our other offices to build internal relationships
- Internal presentations made to other groups in the firm
- Near-retirement lawyers introducing their clients to younger firm lawyers
- Firm alumni contacted
- Dormant/former clients contacted
- Time invested in business development
- Practice areas used for key clients
- Pro bono activities engaged in with key clients/referrals sources/potential clients

## MEETINGS

- » Watch [meetings video](#)
- » Gather group input on agenda and priorities
- » Make business development a major and early part of every meeting
- » Get group input on how to pursue new opportunities and solve business development challenges
- » Support entrepreneurial efforts in alignment with group/firm plans
- » Keep group/firm plans, goals and measures top-of-mind
- » Applaud successes and attempts
- » End with specific commitments for action and begin next meetings with a check-in on progress

## **MENTORING**

- » Encourage business development mentoring relationships at all levels of the firm
- » Train lawyers how to become effective business development mentors
  - Develop coaching skills
  - Develop and track implementation of personal plans
  - Be an active advocate of the mentee
  - Find opportunities to include mentees in business development situations

## **MERGERS & ACQUISITIONS**

- » Pursue merger candidates that are a sound fit with your growth strategies
- » Build a solid business case for expansion
  - Articulate the financial benefit
  - Demonstrate mutual benefit of merger
- » Conduct detailed due diligence
- » Get buy-in of the partners/shareholders and clarify the cost to them
- » Assess cultural fit
- » Utilize published merger checklists

## **PERSONAL BUSINESS DEVELOPMENT OPPORTUNITIES FOR LEADERS**

- » Be a business development role model
  - Engage in high value activities such as on-site visits to clients and prospects
  - Conduct client feedback meetings with high priority clients
  - Share credit for team-based efforts
  - Give business development opportunities to others
  - Demonstrate your passion and enthusiasm for high priority business development initiatives
- » Join Managing Partner and CEO groups
- » Join law firm networks
- » Use Managing Partner/leader status as context to reach out to targeted prospective clients

- » Join partners on important sales calls to high profile prospects
- » Speak/chair major conferences to increase firm visibility
- » Attend other high profile community and industry events
- » Actively support top laterals
- » Build relationships and find opportunities to jointly market with important referral sources

### PLANNING/RETREATS

- » Establish alignment at senior team level
  - Create consensus, strategic direction, goals, measures, roles
- » Develop firm-wide and group plans
  - Establish vision, differentiation, strategies, tactics, goals, measures, accountability and deadlines
  - Use a comprehensive planning approach such as a modified version of the [Balanced Scorecard](#)
  - Encourage planning that gets lawyers working in groups (client and industry teams, practice groups and offices) in alignment with firm-wide plans
    - Require personal plans and track progress
  - Encourage collaborative interaction to maximize input and buy-in
- » Connect key people/teams/groups to capitalize on synergies that potentially exist throughout the firm
  - Encourage relationship building and collegiality through social interactions at retreats and meetings
- » Develop an implementation task force to act on decisions made during the retreat/planning process

### REFERRALS AND FIRM ALUMNI

- » Watch [referrals video](#)
- » Target complementary service providers and build cooperative relationships
  - Give referrals to receive referrals
- » Maintain and nurture relationships with lawyers who left the firm
  - Develop an alumni initiative —conduct events, write newsletters, maintain key relationships



## RESEARCH

- » Conduct research to make informed decisions
  - Market/industry intelligence
  - Competitive intelligence
  - Identify strength of relationships between firm lawyers and key targets (“relationship mapping”)
  - Internal business development culture assessment

## RISK-TAKING

- » Encourage entrepreneurial behavior ([see related article](#))
- » Motivate firm members to perform at a higher level ([see related article](#))
- » Support innovation and become highly prepared to compete in a quickly changing marketplace
- » Value and praise actions (successful and unsuccessful) in alignment with achieving strategy

## STAFF

- » Revise functions of legal support staff to include activities that support business development
- » Conduct client service training for staff that supports training given to the lawyers

## SUCCESSION

- » Identify key firm clients and develop succession protocols
- » Assign second-in-command lawyers
- » Develop checklists of desired behaviors for retiring lawyers and successors
  - Require reporting against the checklist
- » Develop relationship-building strategies for the successor
  - Partner with the relationship partner to get introductions, demonstrate value and meet decision-makers years before retirement
- » Provide retirement planning options
- » Develop a succession plan for the next Managing Partner

- Identify potential candidates and provide training opportunities to develop skills and awareness of the scope of the position

## TEAMS

- » Watch [highly effective teams video](#)
- » Create client teams for high priority clients
- » Develop industry teams to increase market visibility
- » Form internal initiatives teams to accomplish key tasks
- » Bust silos by encouraging joint marketing across practice groups, departments and offices
- » Adapt high performance teams principles
  - Understand and encourage healthy team dynamics
  - Recognize the maturity cycle of teams
    - Forming, Storming, Norming, Performing
  - Clarify roles and responsibilities of leaders and among team members
  - Establish team behavior standards and consequences for non-compliance
  - Enhance internal communication
- » Develop a process for team development and ongoing management
  - Build
  - Monitor
  - Measure
  - Report

**TECHNOLOGY**

- » Use technology to increase the efficiency of business development efforts and gather valuable information
- » Manage the pipeline of new business opportunities
  - Identify targets
  - Track ongoing pursuit activity
- » Mine firm financial data to improve decision-making
- » Identify the relationship strength of your firm with key contacts/ organizations
- » Examine major clients' technology capabilities and develop approaches to align with their systems

**WATCHER ROLE**

- » Develop accountability and track activity within strategically important initiatives - e.g.:
  - Business development
  - Client feedback and action on feedback
  - Client and industry teams
  - Client service
  - Cross-selling
  - Lateral integration
  - Leadership responsibilities
  - Succession planning
  - Action steps from retreats/planning sessions
- » To enhance buy-in and compliance, get "permission" from your lawyers to be watched
- » Require reporting of progress and success
- » Assign power players to watcher roles - the higher the status, the more will get done
- » Create transparency to harness fear of visible failure - "manage by embarrassment"
  - Develop scorecards to track progress
- » Provide ongoing reminders and nudges when necessary
- » Enforce standards
- » Create a sense of urgency
- » Link implementation to compensation
- » Provide appropriate rewards and recognition
- » Key watcher roles:

- Visionary
  - Coach
  - Driver/reminder
  - Coordinator
  - Ultimate decision-maker when needed
  - Communicator
  - Disciplinarian
  - Rewarder
  - Creator of common language
- » See [related article on accountability](#)

#### **WEB SITE, SOCIAL MEDIA, SEO**

- » Maximize search engine optimization
- » Develop a user-friendly, updated, content rich web site
- » Develop solid, updated bios (See related article)
- » Develop a firm-wide social media policy
- » Be active on targeted social media
- » Have all lawyers create effective LinkedIn profiles
- » Develop blogs in key practice areas

## APPENDIX

### POTENTIAL REVENUE FROM MAJOR INITIATIVES

If the firm was extremely effective in the following areas, what amount of revenue can be generated in a year?

- Client feedback \$ \_\_\_\_\_
- Client/industry teams \$ \_\_\_\_\_
- Cross-selling \$ \_\_\_\_\_
- BD-focused leaders \$ \_\_\_\_\_
- Lateral integration \$ \_\_\_\_\_
- Sales and service skills \$ \_\_\_\_\_
- Implementation systems \$ \_\_\_\_\_
- Succession planning \$ \_\_\_\_\_
- Firm and group retreats \$ \_\_\_\_\_
- Total \$ \_\_\_\_\_

### YOUR ACTION CHALLENGES

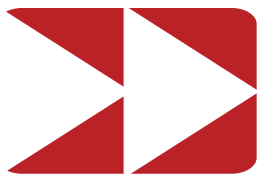
- » What are the most important areas to focus on?
- » What must I do, and what should I delegate to others?
- » Which other leaders should see this list of activities?
- » What do I want other leaders to do with this information?
- » What is the first step I should take to get started?
- » How can I measure our progress toward accomplishing my chosen goals?

### SUGGESTED NEXT STEPS

- » Have your firm participate in a free Culture Xray® assessment
- » Focus other firm leaders on key sections of this guide
- » Provide training and/or coaching for key leaders to help them focus and accelerate group activity in the areas of selling, marketing and service.
- » For targeted lawyers, consider ordering my recent book on business development to improve their business development skills (Secrets of the Masters: The Business Development Guide for Lawyers). For preferred pricing, contact me directly
- » To receive ongoing video tips on leadership and business development, [Click Here](#)

**COMING SOON**

- » A companion book for partners/shareholders focused on their roles as owners to support and enhance the firm's culture of business development



Law Firm

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*Catalysts for Transformation*