Client Development Training and Coaching Program for Law Firms
Coaching the Coaches

When I was busy practicing law there came a point when I was so well known in my narrow transportation construction industry niche that I felt that I had reached the peak in my client development efforts. At that point I went to our firm leaders and offered to do three programs, Client Development 101, 102 and 103, to train our young lawyers. Although the programs were well received and excitement was generated, nothing changed.

After much consideration and research, I again approached our firm leaders to suggest that the Client Development 101, 102 and 103 programs be incorporated into a more in-depth coaching program in which our new partners would participate. As you can imagine they were skeptical as many of them believed that rainmaking is an innate skill – you either have it or you don't.

When we began the new partner coaching program they set a goal of doubling the group's volume of business within two years. After one year the group had exceeded the goal, and I had so much fun working with them that I left my law firm to coach lawyers full time.

I have discovered that many lawyers do not know where to start. Many are interested in developing a book of business but they do not know how. The client development coaching program is designed to give them the skills, confidence and support they need to get started. As important, the client develop coaching program is designed to help the lawyers stick with it and become accountable.

What is Coaching? Why is it Important? And, Why Does it Work for Lawyers?

What is coaching and why does it work more effectively than just teaching and training your lawyers? My friend Dr. Cynthia Pladziewicz, J.D., Ph.D., Consultant and Coach in Dallas says coaching is:

> ***a customized and collaborative relationship between a skilled coach and a lawyer focused on achieving the lawyer's career and client development goals and vision.***

There are some important words in that definition. Customized means it is focused on the individual lawyer. If you have 15 lawyers in your group there will be 15 customized coaching relationships. Collaborative means it is a team effort between the coach and the lawyer. It is not one-way communication the way teaching might be. Notice also that it is focused on the lawyer, not on you, the coach and not on your firm. The thought is that if the lawyer achieves his or her goals it will help your firm achieve its goals.

Client development coaching is important in 2011 for a variety of reasons. Clients have changed. Many are no longer local and no longer loyal. They have way more lawyers to choose from and way less time to choose. Practicing law has changed. Lawyers have many more choices of client development activities and have way less time to do any of them. When there are lots of choices and less time to do what is chosen the natural thing to do is nothing. Coaching helps lawyers make the right choices, narrow their focus, and use their time wisely. Coaching also helps lawyers be accountable.

Why does client development coaching work? I believe because it starts with your lawyers owning it. Lawyers do not want to be told what to do. They want to feel in control. In coaching your lawyers will get out of it what they choose to put into it. They get to choose. Coaching works because it is focused on your lawyers achieving their goals and because it provides both assistance and accountability. To make coaching successful the lawyers who will be in your program have to want to make changes and be held accountable.

How Will Your Firm Benefit?

How will your firm benefit from creating a coaching program? If you do it well, your lawyers will bring in more business and will build trust and rapport with clients so that they stay with your firm, provide other opportunities for your firm to help them and will be more likely to recommend your lawyers and your firm to others. If you do your coaching program well, you will be able to create a new energy in your firm and create a client and client development focused culture in your firm. When the word gets out, your coaching program can be a recruiting tool for both new lawyers and young lateral lawyers. Finally, your coaching program will likely be a retention tool because the lawyers who are coached know you invested in them and they have built deeper relationships with their colleagues in the program and with you.

What is Most Important to Get Right?

I am frequently asked what is the most important thing to get right to have a successful coaching program. Based on my years of experience the answer is easy. You have to select the right people. The lawyers who will be most successful in your program are your lawyers whom you might think need coaching the least. They are the most motivated and they get the most out of the program because they put the most into it. If you have practice group leaders, department heads or office managing partners select lawyers in your firm who “need” coaching, those lawyers will not be engaged and they may have an undue influence on your more engaged lawyers.

In my old firm, I instinctively knew who would be the best candidates for the coaching program. If you prefer to be more objective, one approach to select the right lawyers is to have them apply to be in the program. You might ask:

- Why do you want to participate in the coaching program?
- What do you believe you will get out of the coaching program?

- You would consider the coaching program a success if________.
- What have you done on client development this past year and how has it worked for you?
- What do you believe are your major client development strengths?
- What do you see as the obstacles to you being successful at client development?
- How do you plan to commit the time necessary to the coaching program and implementing client development activities?

When you get the answers to these questions you should evaluate them to see which lawyers are REALLY committed and which lawyers have just filled out the application.

I like to train and coach lawyers who are at about the same experience level. I have coached senior associates, brand new partners, partners with more than $500,000 in business per year and even more senior partners. So, if your firm is large enough to be able to put together a group of lawyers near the same level, that is a good approach. If your firm is not large, still put together a group for the team and accountability advantages.

What are the Criteria for Being a Coach?

Some experts hold the view that in executive coaching, the coach does not need to be a subject matter expert. I believe that in client development coaching for lawyers, the coach does need to be a successful lawyer who has developed business. Lawyers are skeptical and they are less likely to listen and pay attention to someone who is not a lawyer or a lawyer who doesn't have a proven track record. So, the coach should be a lawyer in the firm who is well respected by his or her peers and has a proven track record.

Coaches also need to be open minded to more than one approach. What made the coach a rainmaker may not work for some or all of the lawyers in the program. The coach must recognize that one size does not fit all. The coach must work to develop good questions, actively listen and be empathetic to the lawyers he or she is coaching. Coaching is less about giving the right answers and more about asking the right questions.

What Will You Do As a Coach?

As a coach you will help the lawyers you are coaching with:

1. Figuring out what they want to accomplish-their definition of success.
2. Understanding their values.
3. Planning and goal setting.
4. Figuring out their major strengths and offering ideas and best practices on how to use those strengths.
5. Figuring out the best ways to deal with obstacles they encounter.

6. Questions, feedback and suggestions.
7. Accountability: Pushing each member and the group to attain group and individual goals.

As a trainer and teacher you will help the lawyers with and by:

1. Role playing and experiential learning.
2. Presentation/communication/writing articles and blogs skills coaching.
3. Understanding how clients select lawyers and how to be considered and selected.
4. Networking, developing relationships and converting those relationships into business.
5. Referral to sources on career and client development.
6. Creating opportunities for the team.
7. What clients expect and how to provide it.
8. The role of blogging and social media.

Program Structure: How Many? How Long? How Often?

There is no magic number of lawyers to have in your program. Just to make the point again, the most important thing is to have the right lawyers. If you have the right lawyers and get to pick the number, I would suggest somewhere between eight and twenty depending on the size of your firm and the number of offices in your firm. If your firm is small with only one office, you might have as few as three lawyers in your program. The important thing is to be able to build a team mentality and accountability.

How long should your coaching program be? The majority of lawyers I coach have told me they want to be in the program for 18 months. The idea is to make client development part of your lawyers every day habits and it might take as long as 18 months to do that.

How often you should do training and coaching depends on many things. I like to begin with monthly meetings and coaching calls and then taper off to every other month and sometimes for more experienced lawyers taper further to quarterly meetings and coaching session. I personally conduct training every quarter and I help lawyers in the group who are assigned to lead a meeting with ideas for the monthly training in between. The monthly self-led training is typically done over lunch and typically lasts no more than an hour.

So here are the main points on structure:

- There is a group component with training and accountability and an individual coaching component.
- There is a group goal and group action items and individual goals and action items.

- There is coach led training every quarter. The group should pick the topic and the format (lecture, participatory).
- There is participant led training in the months between the quarters. Someone should take notes and report to the group after the meeting.
- There are individual coaching sessions either in person or by telephone every month or every other month depending on how you set up the program.
- Each month participants should either post to a firm portal page or send an email to the program administrator identifying what client development activities they have undertaken that month.
- Set up an email distribution list for the members of the group and include the coaches and program administrators. Whenever a participant has any kind of success it should be reported to the other members of the group through email to the group members.

Getting Started

You have selected the coaching participants. Now it is time to get started. Your first objective is to get to know the participants and their practices. You must create trust and rapport to be able to coach the participants and getting to know them is the first step.

I send out coaching questions to the lawyers I will be coaching. I ask participants to tell me about their family and to send me a family photo. I want to know the lawyers on a personal level and you should also.

I also ask participants to provide me with a business plan if they have prepared one. I send a plan template to those lawyers who have not prepared a plan. The template is designed to help participants generate thought for their own plan.

When I get the answers to the coaching questions and the photos and personal information, a coaching sheet for each participant is prepared that we use throughout the program. At the top is the family photo and personal information including college and law school and personal interests. In the body of the coaching sheet is a summary of the answers to the coaching questions.

Throughout the coaching program I use the coaching sheet to take notes of our individual coaching sessions. If you feel your keyboarding skills are not sufficient to type notes then I urge you to take handwritten notes or tape the coaching session and have someone transcribe it, then go back and capture the important parts of the discussion.

The First Group Meeting

I urge you to have your managing partner or another firm leader kick off the meeting. It is important that participants know that the firm leaders support and are behind the program.

During the first meeting discuss the difficulty lawyers have making changes. Then, cover client development 101 for 2011 and beyond. Tell participants how client development is different today and more challenging.

I suggest you consider breaking your participants into two or three groups depending on the size of the group. Tell them to pretend they are a firm within your firm and will be judged by how well they do getting new business and expanding business with existing clients. Have Group 1: Brainstorm and come up with actions that can be implemented now that will produce new business and more business from existing clients in the next 12 months. Have Group 2: Brainstorm and come up with actions that can be implemented now that will produce new business and more business with existing clients within 1-3 years. Have Group 3: Brainstorm and come up with actions that can be implemented now that will produce new business and more business from existing clients 3 years and beyond. Your group will revisit these ideas when they develop their 25 Action Items later in the meeting.

Explain what coaching is all about and what a coach does. Let participants know there is a training and teaching component of the program and a coaching component. I urge you to discuss how you will structure the program.

Your First One-on-One Coaching Session

Your goal in this first session is to get to know the lawyer you are coaching and for the lawyer to get to know you. I suggest that before you meet, you write down questions to ask the lawyer you are coaching. If you think you will have trouble remembering the questions, copy them to your coaching sheet for each lawyer. In the first session I have asked:

- Tell me about you and your family.
- What do you enjoy doing as a family?
- What do you enjoy doing as a hobby or just for fun?
- What is the most enjoyable part of your law practice?
- Describe your ideal client.
- What client development activities do you enjoy the most?
- Describe where you are in your client development efforts now?
- What would be a home run for you in this coaching program? It will be successful if…
- What if anything has been holding you back from achieving your goals?
- What do you want to learn how to do better than you are now?

I always end the first coaching session by asking the lawyer I am coaching what she wants to accomplish over the next 90 days. I call it 90 Day Goals, but more accurately it is 90 Day Actions. I type the 90 Day Goals in the lawyer's coaching sheet and send them in an email as soon as we finish the coaching session. During the next coaching session the status of work on the 90 day goals is one of the agenda items.

Subsequent Coaching Sessions

I ask each lawyer I coach to send me an agenda of items he wants to discuss in our coaching sessions. One lawyer I coached had a similar agenda each month:

- Report on what he did the last 30 days.
- Report on what he planned to do the next 30 days.
- 2-3 items to brainstorm.
- Cordell's tip of the month.

In the coaching sessions, some lawyers will want you to give them the answers and you will be tempted to do it. When that happens, even if you have an idea to share, I suggest that you first turn the question back to the lawyer you are coaching. You might say: What do you think…? If you actually do want to provide your opinion consider saying it this way: "Have you considered…?" or "Have you given any thought to…" When I actually give an answer I frequently say: If I was in your shoes, and I am not in your shoes, but if I was I would… What do you think of that approach?

After a few months, I ask the lawyers I am coaching for a report card on how they are doing. So, I might begin by asking them to give themselves a grade on a 1-10 scale with 10 being the highest. I let them know I am not asking about successes, but rather asking them to grade their client development actions. Then I ask what they think they are doing well. When they answer that might lead to additional follow up questions about their answer. Then I ask what they want to do (note I do not say need to do) to get their score to a 10. Then I ask how they plan to accomplish what they want to do. Getting the lawyers to tell you what they plan to do makes it far more likely they will actually do it.

Group Monthly or Bi-Monthly Meetings

I suggest that your group meet monthly or bi-monthly without you to brainstorm client development topics on their own.

Quarterly Teaching/Training Meetings

After the first kick-off meeting, consider letting the group decide the topics they want to cover at each quarterly group meeting. Potential topics:

- How Clients Select, What Clients Want and How to Give it to Them
- How to Do a Business Plan, Set Goals, Make Time for Client Development and Hold Yourself Accountable
- Writing and Speaking to Get Hired
- Relationship Building with Clients. Potential Clients and Referral Sources
- Beyond Selling: How to Get Hired Without Coming Across as a Salesman
- Blogging, Webinars and Using Social Media

- Cross-Selling and Expanding Relationships with Clients
- Leadership for Lawyers

Final Coaching Assessment

I believe you should ask each lawyer in your coaching program to do a self-assessment at the end of the program. Here are some questions I have used.

Coaching Self-Assessment

1. Think back about what you wanted to achieve in the coaching program, and on a scale of 1-10 with 10 being the highest, give yourself a grade.
2. What are you most proud of accomplishing?
3. What smaller objectives did you achieve?
4. What improvements and changes have you made?
5. What would you have wanted to do that would have gotten you to a 10?
6. What did you learn about client development?
7. What have you learned about yourself?
8 How will you apply what you have learned about client development and about yourself in the future?
9. What would you like to accomplish on client development over the next year? 90 Days?
10. What is the one piece of advice you would give someone who follows you in the client development coaching program?

Client Development Group Coaching Sessions Potential Topics

1. Client Development in 2011 and Beyond
2. How to Prepare a Business Plan with Goals and Hold Yourself Accountable
3. Client Development Tools You Can Use
4. Your Best Sources of Clients and Referrals
5. How Clients Select Lawyers and Law Firms
6. How to Get Started with Your Client Development Efforts - Self Assessment, Determining What You Want to Accomplish
7. Client Development Principles That Are Important for Everyone
8. Client Development Practical Tips
9. Client Development Mistakes and How to Avoid Them
10. Making Time for Client Development When You are Busy
11. Determining What Client Development Efforts Will Work Best for You
12. Writing Articles and Blog Posts
13. How to Prepare a Presentation for Potential Clients - In Person, Webinars, Podcasts
14. How to Deliver an Effective Presentation That Will Get You Hired
15. Staying in Touch with Contacts without Being a Pest
16. The Why and How of Social Media
17. Building Trust and Rapport to Get Hired
18. Client Service-What Clients Want and How to Deliver It

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During this program you will learn what, why and how to change your client development efforts to achieve greater success and more enjoyment in your law practice and daily life.

This program will:

- Help you build the foundation to make client development a part of your regular routine;
- Furnish practical examples of client development activities that work;
- Stimulate ideas on how to develop valuable relationships with your clients; and
- Empower you to take the client development actions that will achieve your goals.

By the end of the program you will have:

- Defined your target market and referral sources to broaden opportunities;
- Initiated a client development plan with goals and begun to take actions and be accountable;
- Created a 90 day action plan;
- Reviewed, updated and enhanced your bio;
- Identified trade, industry or client organizations for which you will become the "go-to" person by writing, speaking, and listening; and
- Discovered your learning style and personality type and those of your clients.

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- **the detailed participant guide**
- **three group telephone coaching sessions**

PROGRAM SPEAKER

Cordell Parvin shares 36-years of expertise in building successful law practices, building enduring client relationships, and establishing a respected professional reputation. His passion is working with lawyers at every stage of their career to help them break out of their routine, actively pursue the most satisfying career, and increase their value to clients. Cordell conducts workshops around the country for law firms of every size.

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