



**Law Firm Leadership Development
For Lawyers who Lead**

Date TBD

Place TBD

Presenter Karen MacKay, MBA

Program Leader - Karen MacKay, MBA, CHRP



Karen has more than 20 years of professional services experience combined with an MBA from the Rotman School of Management at the University of Toronto; a Certified Human Resources Professional and licenses in several tools and assessments. Today she has a number of loyal and longstanding clients who have come to count on her for her knowledge and integrity, as well as for her sensitivity and flexibility in the face of their ever-changing business priorities. In 2009, Karen was elected to become a Fellow in the College of

Law Practice Management in recognition of her contribution to the law practice management profession.

With excellent communication, presentation, facilitation and coaching skills, Karen's practice is focused on professional service firms and the professional talent within them: leadership and strategy, governance and management; compensation, assessment and development through to succession planning and exit strategies. Further, Karen is a globally recognized expert on the challenges, expectations and motivations of the generations at work in law firms today; the management challenges around motivation, reward and retention of associates, of women and of partners nearing retirement.

Karen writes regularly for legal publications in Canada, the United States, the United Kingdom and Australia. She is a member of the Practice Management section of the American Bar Association and is a member of the Editorial Board of Law Practice Magazine, an ABA publication.

Prior to founding Phoenix Legal, Karen led the Canadian legal practice of one of the largest human capital management consulting firms in the world. Before that she spent eleven years as the Chief Operating Officer of a large Canadian law firm.

Purpose

The purpose of this program is to:

1. Increase knowledge and business acumen within the law firm context.
2. Raise self-awareness, identify natural strengths and develop leadership style.
3. Develop skills required for effective leadership and to apply learning through experience in a leadership role.
4. Hone skills and develop confidence through coaching and mentoring as participants apply learning in real-life situations.
5. Build leadership *bench-strength* within the firm of skilled and knowledgeable candidates for succession of leadership roles in the firm.

Audience

This program is designed with sufficient flexibility to adjust to the unique culture and strategic imperatives of the firm. Content and scenarios are designed to meet the needs of partners who are experienced leaders and currently in a leadership role such as group leader or office management partner.

Ideal Group Size

Minimum of 8 / Maximum of 12

Timeline

Twelve months.

Methods

Methods are designed to increase retention, skill development and confidence.

- Reading and group directed learning conversations
- Assessments
- Presentation – introduction of new concepts
- Facilitated Group Discussion – collaborative learning
- Case Studies and/or Scenario Planning
- Coaching – one-on-one to meet the unique needs of individual participants

<i>Source: Coaching for Performance By Sir John Whitmore</i>	When told...	When told & shown...	When told, shown and experienced...
Recall after 3 weeks	70%	72%	85%
Recall after 3 months	10%	32%	65%



<p>Book Selection for Pre-Reading:</p> <p><i>When Professionals Have to Lead</i></p> <p>Thomas J. DeLong, John J. Gabarro and Robert J. Lees.</p>	<p>Module One – Building the Foundation</p>
	<p>Introductions, Expectations and Norms</p> <ul style="list-style-type: none"> ▪ Who are you? Why are you here? ▪ What norms should guide our meetings?
	<p>The Business Case for Leadership</p> <ul style="list-style-type: none"> ▪ Leadership & Law Firm Success – the Link to Profitability <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>Leadership and Law Firm Success: A Statistical Analysis</i> (McBassi & Company) ▪ <i>What Leaders Really Do</i>, HBR, John P. Kotter
	<p>Assumptions About Leadership - Group Discussion & Debrief</p>
	<p>Finding Leadership Opportunities</p> <ul style="list-style-type: none"> ▪ Community Service, in the Profession and in the Firm
	<p>Foundation Skills</p> <ul style="list-style-type: none"> ▪ Meetings your Colleagues will want to Attend ▪ Effective use of technology (Live Meetings, Video Conferencing, Conference Calls and other resources) ▪ Planning the meeting and developing agendas ▪ Leading inclusive meetings ▪ Managing Time <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>Meetings your Colleagues will want to Attend</i>, by Karen MacKay ▪ <i>Managing Meetings</i>, Resource Handout ▪ <i>Who's got the Monkey</i>, 1999 HBR, William Oncken Jr., Donald L. Wass, Stephen R. Covey



	<p>Setting a Personal Example</p> <p>Participants create a personal vision for leadership in their own firm today; the platform for success; the interfering factors that impede your development as a leader and your impact as a leader in your firm given its evolution. Participants then develop an action plan; get feedback from others and from the session facilitators.</p> <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>What to Ask the Person in the Mirror</i>, HBR, Robert S. Kaplan ▪ <i>Partner Performance</i>, Karen MacKay ▪ <i>New on the Job? Engage your People</i>, Law Practice, Karen MacKay
	In-Person Coaching Session
	Telephone Coaching Session
	Telephone Coaching Session
<p>Book Selection for Pre-Reading: <i>The Speed of Trust</i>, Stephen M.R. Covey</p>	<p>Module Two – Raising Self Awareness and Playing to your Strengths</p>
	<p>Assessing Your Leadership Style</p> <p>The diagnostics in context</p> <ul style="list-style-type: none"> ▪ MBTI – revisit personality from a leadership perspective ▪ Assessment TBD (Utilize instruments in use in the law firm) <p>Understanding your strengths and how to build complementary skills around you.</p> <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>Making Lawyers into Leaders</i>, European Lawyer ▪ <i>Seven Leadership Checkpoints for Lawyers</i>, Maynard Brusman
	<p>Developing your Leadership Style</p> <p>Presentation & Facilitated Discussion</p> <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>Leadership That Gets Results</i>, HBR, Daniel Goleman ▪ <i>Developing Versatile Leadership</i>, MIT Sloan, Robert E. Kaplan & Robert B. Kaiser ▪ <i>Leadership Run Amok</i>, HBR, Scott Spreier ▪ Worksheet I – Developing your Leadership Style



	Earning Trust & Political Capital <ul style="list-style-type: none"> Facilitated Discussion based on The Speed of Trust
	In-Person Coaching Session
	Telephone Coaching Session
	Telephone Coaching Session
Pre-reading: The Responsibility Virus: How Control Freaks, Shrinking Violets and the Rest of Us Can Harness the Power of True Partnership, By Roger Martin	Module Three – Leading Teams
	The Leadership & Management Team <ul style="list-style-type: none"> The Difference Between Leadership and Management Challenges of Producer – Leader Companion Materials <ul style="list-style-type: none"> <i>Why Should anyone be Led by You?</i>, HBR, Robert Goffee & Gareth Jones <i>Seven Transformations of Leadership</i>, HBR, David Rooke & William Torbert <i>Building the Emotional Intelligence of Groups</i>, HBR, Vanessa Urch Druskat and Steven B. Wolff
	Dealing with Difficult Situations Assessment <ul style="list-style-type: none"> Thomas-Kilmann Conflict Mode Instrument Companion Materials <ul style="list-style-type: none"> <i>Change the way you Persuade</i>, HBR by Gary A. Williams and Robert B. Miller Difficult Conversations, (or similar) <i>Zero Tolerance for Jerks</i>, Workforce.com, John Hollon We Have to Talk: Difficult Conversations Checklist, Judy Ringer <i>A CEO's Six Steps to Effective Feedback</i>, Harvard On Line, Christina Bielaszka-Vernay



	<p>Building Consensus</p> <ul style="list-style-type: none"> ▪ Understanding how the Firm works (structure, politics and process) ▪ Understanding the law firm’s Culture ▪ Collaborative Problem Solving Process <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ Collaborative Problem Solving Resources ▪ <i>Great Coaching in Action</i>, David Maister ▪ <i>Best Management Tool Ever</i>, Anthony Sturgess & Phil Higson ▪ <i>Five Dysfunctions of a Team</i>, Patrick Lencioni
	In-Person Coaching Session
	Telephone Coaching Session
	Telephone Coaching Session
	Module Four– Leading and Managing Change
<p>Book Selection for pre-reading:</p> <p><i>Our Iceberg is Melting</i></p> <p>John Kotter & Holger Rathberger</p> <p>And/or</p> <p><i>A Sense of Urgency</i></p> <p>John Kotter</p>	<p>What to Change and Why</p> <ul style="list-style-type: none"> ▪ Introduction of the Case or Situation in the Firm ▪ Facilitated Discussion – using Iceberg as a guide <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ The Case – Smith Simpson: More Questions than Answers ▪ Change Leaders Worksheet – for the Case ▪ Change Leaders Worksheet – for your Firm/Group/Organization
	<p>The Change Process</p> <ul style="list-style-type: none"> ▪ Presentation and Group Discussion <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>Leading Change in the Legal Environment</i>, Karen MacKay, PLMW ▪ <i>The Quick Wins Paradox</i>, Mark E. Van Buren and Todd Safferston, HBR, January 2009



	<p>Leading and Managing Change</p> <ul style="list-style-type: none"> ▪ Mapping out a change process ▪ Collaboration, problem solving and building consensus ▪ True Urgency ▪ Overcoming Resistance <p>Companion Materials</p> <ul style="list-style-type: none"> ▪ <i>How GE Teaches Teams to Lead Change</i>, January 2009 HBR, Steven Prokesch ▪ <i>Dealing with Organizational Change</i>, Shawn Baker ▪ <i>Decoding Resistance</i>, HBR April 2009, Jeffrey D. Ford and Laurie W. Ford ▪ <i>How to Work the Unwritten Rules and Lead Change</i>, Oct/Nov 2008 Law Practice, Arthur G. Green ▪ <i>Making Good Decisions in the Face of Change</i>, Law Practice, Karen MacKay ▪ <i>Change the Way You Persuade</i>, HBR May 2002, Gary A Williams and Robert B. Miller
	In-Person Coaching Session
	Telephone Coaching Session
	Telephone Coaching Session
<p>Reflection & Debrief</p>	<p>Wrap up and Final Debrief – Virtual or Live Meeting at the law firm’s retreat or other similar setting</p> <p>Reflections & Dialogue</p> <ul style="list-style-type: none"> ▪ What have you learned? ▪ How has this experience impacted you? ▪ How has this experience impacted your group or the firm?