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LAW FIRM LEADERS DEVELOPMENT WORKSHOPS

KAREN MACKAY, MBA
PHOENIX LEGAL INC

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REGISTRATION & COSTS

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Cost: $995 per program; $1500 for both.

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Title: Law Firm Leaders Development Workshop

Subtitle: Leadership Challenge I - Developing Your Leadership Style

Date: March 17, 2010

Place: Hilton Garden Inn, 815 - 14th Street N.W.
Washington, DC

Presenters: Karen MacKay & Gerry Riskin

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Washington, DC
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▪ Why are you here?
▪ What norms should guide our meeting?</td></tr>
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Companion Materials
▪ Leadership and Law Firm Success: A Statistical Analysis (McBassi & Company)
▪ What Leaders Really Do, HBR*, John P. Kotter</td></tr>
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▪ Challenges of Producer - Leaders
Companion Materials
▪ When Professionals Have to Lead, HBR*, Thomas DeLong
▪ Why Should anyone be Led by You?, HBR*, Robert Goffee & Gareth Jones
▪ Seven Transformations of Leadership, HBR*, David Rooke & William Torbert
▪ Hiring Your Next Administrator, Law Practice ABA, Karen MacKay
▪ Sample Role Description – Managing Partner
▪ Sample Role Description – Legal Administrator
▪ Your Influence on Staff, Law Practice, Ed Flitton
Tom Peters 3 minutes & 53 seconds on Leadership</td></tr>
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1:00 – 1:45	Tab 5 - Assessing Your Leadership Style The diagnostics in context ▪ MBTI ▪ Thomas-Kilmann Conflict Mode Instrument Understanding your assessment **Companion Materials** ▪ Making Lawyers into Leaders, European Lawyer ▪ Seven Leadership Checkpoints for Lawyers, Maynard Brusman ▪ Change the way you Persuade* HBR by Gary A. Williams and Robert B. Miller
1:45 – 2:30	Tab 6 - Developing your Leadership Style Presentation & Facilitated Discussion **Companion Materials** ▪ Leadership That Gets Results, HBR*, Daniel Goleman ▪ Developing Versatile Leadership, MIT Sloan*, Robert E. Kaplan & Robert B. Kaiser ▪ Leadership Run Amok, HBR*, Scott Spreier ▪ Worksheet I – Developing your Leadership Style
2:30 – 2:45	Break
2:45 – 3:45	Tab 7 - Leadership in Action Collaborative Problem Solving Process Small Group Exercise **Companion Materials** ▪ Zero Tolerance for Jerks, Workforce.com, John Hollon ▪ We Have to Talk: Difficult Conversations Checklist, Judy Ringer ▪ A CEO's Six Steps to Effective Feedback, Harvard On Line, Christina Bielaszka-Vernay ▪ Great Coaching in Action, David Maister ▪ Best Management Tool Ever, Anthony Sturgess & Phil Higson

The Leadership Challenge I: Advanced One-Day Program For Law Firm Leaders Washington, DC March 17, 2010	
3:45 – 4:30	Tab 8 - Setting a Personal Example 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. **Companion Materials** ▪ What to Ask the Person in the Mirror, HBR*, Robert S. Kaplan ▪ Partner Performance, Karen MacKay ▪ Steering Your Firm through Uncharted Waters, Law Practice, Karen MacKay ▪ Making Good Decisions in the Face of Change, Law Practice, Karen MacKay ▪ New on the Job? Engage your People, Law Practice, Karen MacKay
4:30 – 5:00	Reflections & Dialogue Debrief & Discussion ▪ What have I learned today? ▪ How can I leverage today's learning back at the firm?

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Title: Law Firm Leaders Development Workshop

Subtitle: Leadership Challenge II – Profitability & Change

Date: March 18, 2010

Place: Hilton Garden Inn, 815 - 14th Street N.W.
Washington, DC

Presenters: Karen MacKay & Gerry Riskin

The Leadership Challenge II: Profitability & Change An Advanced Program for Law Firm Leaders Washington, DC March 18, 2010	
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8:30 – 8:50	Tab 1 - Introductions, Expectations and Norms ▪ Who are you? ▪ Why are you here? ▪ What norms should guide our meeting?
8:50 – 9:30	Tab 2 - Setting the Stage ▪ Trends ▪ Uncertainties ▪ Future of the legal professional ▪ Impact on you and your firm • What resonated from the presenters you've heard in the past day and a half? **Companion Materials** ▪ Leadership and Law Firm Success: A Statistical Analysis, McBassi & Company ▪ Thomson West PMI ▪ Six Market Trends You Can't Afford to Ignore in 2009. BTI ▪ BTI Mid-Year Legal Spending Up-date Video (if not used at conference: Social Media Revolution in 4 minutes and 23 seconds
9:30 – 10:15	Tab 3 - What to Change and Why Introduction of the Case Discussion will arise from the case and from experiences of those in the room and the presentations earlier in the conference **Companion Materials** ▪ The Case – Smith Simpson: More Questions than Answers ▪ Change Leaders Worksheet – for the Case ▪ Change Leaders Worksheet – for your Firm
10:15 – 10:30	Break

The Leadership Challenge II: Profitability & Change An Advanced Program for Law Firm Leaders Washington, DC March 18, 2010	
10:30 – noon	Tab 4 - The Change Process Presentation and Group Discussion **Companion Materials** ▪ Leading Change in the Legal Environment, Karen MacKay, PLMW ▪ The Quick Wins Paradox, Mark E. Van Buren and Todd Safferston, HBR, January 2009* ▪ Hitting the Reset Button, Ed Wesemann Video – Kotter on Change
12:00 – 1:00	Lunch
1:00 – 2:00	Tab 5 - Profitability ▪ Building a Dashboard ▪ Key Performance Indicators ▪ Keeping your eye on the dashboard while managing change
2:00 – 2:30	Discussion of the financial issues arising from the case
2:30 – 3:00	Break
3:00 – 3:45	Tab 6 - Leading and Managing Change ▪ Mapping out a change process ▪ Collaboration, problem solving and building consensus ▪ True Urgency ▪ Five Dysfunctions of a Team ▪ Speed of Trust ▪ Overcoming Resistance **Companion Materials** ▪ Managing Change: Law Practice Roundtable, MacKay/Flitton ▪ How GE Teaches Teams to Lead Change, January 2009 HBR, Steven Prokesch* ▪ Dealing with Organizational Change, Shawn Baker ▪ Decoding Resistance, HBR April 2009, Jeffrey D. Ford and Laurie W. Ford* ▪ How to Work the Unwritten Rules and Lead Change, Oct/Nov 2008 Law Practice, Arthur G. Green ▪ Building the Emotional Intelligence of Groups, HBR, Vanessa Urch Druskat and Steven B. Wolff* ▪ Making Good Decisions in the Face of Change, Law Practice, Karen MacKay ▪ Change the Way You Persuade, HBR May 2002, Gary A Williams and Robert B. Milller*

The Leadership Challenge II: Profitability & Change An Advanced Program for Law Firm Leaders Washington, DC March 18, 2010	
3:45 – 4:00	Debrief
4:30 – 5:00	Reflections & Dialogue ▪ What have you learned? ▪ How has this experience changed your approach to change? ▪ How can you leverage the learning from this program back at the firm?

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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 a number of 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, 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.

Karen can be reached by e-mail at kmackay@phoenix-legal.com or by telephone at 416.657.2997.

Gerald A. Riskin, B. Com, LLB, P. Admin

Gerry Riskin is a Canadian lawyer and Business School graduate with a global reputation as an author, management consultant and pioneer in the field of professional firm economics and marketing.

After winning two Queen Elizabeth Scholarships, he practiced law from 1973, in 1979 becoming a partner with one hundred-year-old Emery Jamieson and then in 1984 becoming the Managing Partner of Snyder & Company with offices in Canada and Hong Kong.

Gerry was consistently one of the top three rainmakers in his firm and quickly began to develop a reputation which led to a demand for his abilities to teach others to do the same.

In 1983, Gerry co-founded The Edge Group which in January 2001 evolved into Edge International. Over our history we have topped the list in a survey depicting the most popular marketing consultants by major U.S. firms and have been named one of the top three legal consultancies by U.S. Managing Partners.

Gerry has served the Conference Board of Canada, is a Fellow of The College of Law in London and a Visiting Professor at the University or Pretoria in South Africa.

Gerry co-authored, at Butterworths' request, a text on the marketing of legal services called *Practice Development: Creating the Marketing Mindset*, and, for The Institute for Best Practices, two works for those in firms with management responsibilities: *Herding Cats* and *beyond KNOWING*, both of which have become management best-sellers (*Herding Cats* has remained on the "Canadian Management Bestsellers" list for several years).

Gerry can be reached by e-mail at riskin@edge-international.com or by telephone at 202.957.6717.

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ADVICE FOR MANAGING PARTNERS

takingthelead

NEW COLUMN

Steering Your Firm through Uncharted Waters

KAREN MacKAY | Managing partners have been called on to lead their firms through previous recessions, like the one in the early 1990s, for example. The current recession, however, appears to be unlike the others, both in depth and the likelihood that it will result in structural changes to the economy. As a leader, your job is to guide your firm through the impacts of these rough and unique waters.

Here are thoughts on how to stay resilient and walk the fine line between optimism and realism *and* between logic and values.

Maintaining Resilience

Every member of your firm is watching how you react to changes in the economic environment—and the decisions you make for the firm in response. They are looking to you, as firm leader, to set the example in what you do, what you say and how you carry yourself. You will need to demonstrate resilience, which requires keeping your energy up in these tough times.

Knowing how and where you get your energy from is an important first step. More introverted types typically build energy with an appropriate amount of alone time and quiet space. If that describes you, then you may need dedicated time to think things through and write out key messages instead of speaking "off the cuff," so that you sound eloquent and confident. Extroverts, on the other hand, build energy by action, by variety, and by openly talking through their issues and challenges. If you're the extroverted type, you could be well served by working with a coach external to the firm, providing you with a safe place to talk through challenges and ideas so you don't end up editing your thoughts on key messages in front of firm members.

Resilience is also about keeping yourself in balance, in physical, mental, emotional and spiritual terms. Nutrition, exercise and sleep are critical to *physical* health. Staying connected with family and friends—the people who keep you anchored—is vital to *emotional* health. A sense of confidence in your skills as a leader is necessary for *mental* health. And lastly, aligning decisions with core values—as a person, as a leader and as a firm—will be necessary for your *spiritual* health. You are setting the example, remember, so you must make every effort to keep these four areas in balance.

Making and Communicating Decisions

Being a managing partner means setting direction for the firm, which requires making decisions. Three factors influence our decision-making preferences. The first is personality. In terms of this, here's a question to ask yourself: Do you make your economic decisions based on their bottom-line impact, or do you tend more to worry about the effects on the firm's people?

Logical decision makers can be viewed as cold and distant, but they may also be seen as having the entity's best interests in clear view. In comparison, leaders who make decisions based on guiding principles regarding the firm's people may appear too soft, but they may also have the firm's long-term best interests in clear view as they focus on the firm's only real asset—its people. Leaders whose decisions focus *both* on the economic impacts and the effects on people, particularly in tough times, set a personal example that is admired.

Two other factors that influence decision making are skills and competencies. So ask yourself: Where do you stand in terms of those? The leaders who know what they

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NEW COLUMN FOR MANAGING PARTNERS. In Taking the Lead, *Law Practice* Editorial Board members Ed Flitton and Karen MacKay tackle the ins and outs of running a law firm, providing expert guidance that every managing partner can use.

TAKING THE LEAD | *Continued from page 64*

don't know and, in turn, reach out to develop their leadership skills and competencies will be the ones who grow and strengthen during difficult times. Those who already think they know it all set themselves up for failure.

Also, remember that at all levels of the firm your people will be hungry to know about the decisions you are making to steer the firm through the recession. Generally, here's what most are thinking: "Tell us what we are going to do. Tell us what you considered and your rationale for it. Tell us when it will take effect and how it will impact me." Be aware that when you fail to give them the desired information, people have a natural tendency to fill the void, which can result in misinformation, disquiet and even fear spreading through the firm.

So not only is your job to make good decisions, but also to communicate them effectively. Communicate, communicate, *communicate*—and give opportunities for some to talk it through, while giving others the space to reflect and think it through.

Walking the Optimist-vs.-Realist Line

Finally, when you think of this recession, do you see the sky falling, or can you find the silver lining? A managing partner who ignores the depth of the challenges facing the firm may be judged for having lost touch with reality. At the same time, one who is overly pessimistic may be seen as lacking a vision of the future that the firm's members can support. As Rahm Emanuel, the new White House Chief of Staff, once said, "You don't ever want to let a crisis go to waste: It's an opportunity to do important things that you would otherwise avoid."

When law firms are busy everyone focuses on the next deadline, closing, client meeting or court date. Now that many (if not most) of your partners are less busy, it's an ideal time to consider how to revamp the firm to adjust to the emerging new economy, by realigning practice areas, creating new practice groups and developing new marketing opportunities. It's also a time to change the way you work so you can add more value and drive down costs. So be sure you look for opportunities in pockets of the firm to create future capabilities—and also seek to involve clients in that work off the timesheet to grow their loyalty *and* their business in the down economy.

In sum, you need to be realistic with your partners while maintaining a vision for a successful future. Chart your course, communicate it clearly, and build consensus and alignment toward that direction. Work with practice groups that are slower in this economy to prepare for the recovery and position those groups to take advantage of the growth curve when it happens. Work with your clients while retaining your talent—for example, you could establish programs where you loan your lawyers to clients for an extended time at a cost-recovery rate. Further, work with your people to retain them through flexible or reduced schedules and support opportunities to build their skills and your firm's capabilities while reducing costs. Lawyers have claimed for years that they would welcome reduced hours and reduced income to balance their lives. Now might be the time to partner with your people and build trust through that process.

When the recovery happens, preparation will meet opportunity and your firm will be positioned for success under your watch. LP

Karen MacKay (kmackay@phoenix-legal.com) is President of the consultancy Phoenix Legal Inc., focusing her work on leadership and strategy execution for law firms. She is also a member of *Law Practice*'s Editorial Board.

ADVERTISERS INDEX

ADVICE FOR MANAGING PARTNERS

takingthelead

New to the Job? Engaging Your People

KAREN MacKAY | Last week I noticed a news item announcing a new managing partner at a major law firm in my region. There haven't been very many of those announcements lately. As a number of managing partners have recently shared with me, while they may wish they had handed over the reigns a year ago, they feel an obligation to steward their firms through this difficult era.

Still, leadership changes in firms will be necessary sooner or later. If you are tapped on the shoulder by your partners, how will you take charge? How elegant will the transition be? How will you make your mark early in the process?

One thing we know about leadership in any organization, but particularly in law firms, is that when leadership changes, the organization changes and so do the profitability drivers. The profits may go up or go down with a new leader, but be assured, there will be change. To get you thinking about how to effectively achieve the right kind of change, here are pointers on using "presence, message and action" to engage your people in the end game.

■ **Presence.** In the leadership development work that I do, the phrase "executive presence" comes up from time to time. The phrase captures the characteristics seen in leaders—some elusive and some concrete. It also captures concepts related to image as well as physical presence and visibility. (As my fellow column author Ed Flitton noted recently, your partners, associates and staff will be watching you—and all from their own perspectives.)

Presence is about your image, poise, confidence and presentation style. You will set a tone and present an image that will be your version of what a leader looks like and acts like. So will you be buttoned down or relatively casual? Will you make the job look easy or will you show your stress? Will you present a formal and rather distant style or will you have an open door?

Presence also means visibility. Will you visit every office, walk every floor, attend every group meeting and hold town hall meetings for the staff? Leaders all have one characteristic in common—they have people who will follow. Holding the reigns means people will need to know who you are and what you stand for. They will need to know you, see you and hear you—in person—so you need to get out there.

■ **Message.** The culture of every law firm is different and evolves over time. The role of the leader is unique in every firm. In some the leader sets the direction, while in others the leader guides a discussion and builds consensus with inputs from all key stakeholders. Whether platoon leader or orchestra leader, however, people need to hear and understand your vision. Talk 20 percent of the time and listen the other 80 percent.

How can you connect with the people in your firm, both intellectually and emotionally? How can you communicate direction, hope, confidence and belief in the firm's future and your ability to steward it? Steward is a carefully chosen word in this context: Your stewardship means leaving the firm stronger than it was when you became a partner and stronger than it was when you took over as leader.

■ **Action.** Taking action, moving forward, getting people to do something … therein lays the challenge of leadership. In the practice of law, when the document is done and the deal is signed, the work is done, right? But in the *business* of law when the document is done and signed, the work is ready to begin. Your work means getting your people behind the plan, inspiring them to action, and breaking the action steps down into the right-chunk size so that individuals and groups can actually accomplish something. Take shareholders off-site and engage them in meaningful dialogue—get their input and buy-in and get them swimming in the same direction.

Leadership is about moving from idea to action, from talk to action, from plan to action and keeping up the momentum. Lastly, leadership is about holding people accountable, about reviewing actions taken and adjusting course as needed in order to achieve measurable change. LP

Karen MacKay (kmackay@phoenix-legal.com) is President of the consultancy Phoenix Legal Inc., focusing her work on leadership and strategy execution for law firms. She is also a member of *Law Practice*'s Editorial Board.

ADVICE FOR MANAGING PARTNERS

takingthelead

Getting Your Partners to Take Action

KAREN MacKAY | Over the past few months, I have been in a number of law firms where the partners say all the right things in a meeting—and then they go right back to their offices and not only fall back to hold habits, but worse, freeze into inaction. So what is a managing partner or group leader to do?

Many years ago a fellow named Art Linkletter had a television show called "Kids Say the Darndest Things." I remember one episode where he asked the children why they ignored their mothers' requests or, alternatively, what would make them comply—as in, what triggered them to actually go to the dinner table, brush their teeth or get their pajamas on. Without hesitation one child said, "I wait 'til I hear the feet." "What do you mean?" Linkletter asked. "Well, I don't really listen to all the talking," the child said, "but when I hear her feet [read, she's heading in my direction] I know she means business, so I do what I'm told."

The lesson here, of course, is that talk is cheap and too often brings little results. Action, on the other hand, conveys that you are serious—and that inaction on the other person's part will likely have consequences.

Now, let's apply this to how you, as a firm leader, can get your partners moving in the desired direction. Here is a top-10 list of ideas to use when you want them to respect "the sound of your feet."

1. Don't hide behind e-mail. The benefit of e-mail is that all partners get the same information, presumably at the same time. The risk is that the *real* message of your words will be lost without the emotional context of in-person contact. Remember that you have to engage their hearts as well as their minds if you want real change.

2. Engage your partners one at a time. Yes, this kind of one-on-one interaction is time-consuming but whenever you can connect your message to partners individually and personally, it represents an opportunity to effect change.

3. Get your executive director involved. To further inspire action, you might try taking the good cop role to your administrator's bad cop role. To keep everyone on their toes, reverse roles the next month, when the administrator can listen with empathy and you can be play the heavy.

4. Be consistent. If, for example, you require that all equity partners bill out quarterly in order to get a draw check, you need to ensure there are no exceptions to the policy. Period. Consistency is critical.

5. Get their staff involved. Lawyers typically are more afraid of their own assistants than they are of anyone in a leadership role. So if you can make something that will please staff contingent on partners' delivering action, odds are good you'll get some solid "behind the scenes" support from their people.

6. Communicate a clear vision of the future. Create clarity around what the firm would be like with a change in partner behavior, and what impact the change would have on all the individuals involved.

7. Respond to partner inquiries with confidence. When, for example, your partners ask you why the firm is not doing "that"—meaning something that's happening in another firm—respond that it's because "we are doing this"—and be confident and consistent in your responses. This is hard work, but it is key to achieving the direction you've set.

8. Hold them accountable. When you've had a one-on-one meeting with a partner, follow up with an e-mail confirming the commitments the individual made in your meeting. Keep your commitment to follow up further with this partner, too.

9. Keep smiling. It will make them crazy.

10. Finally, for your own self-preservation, limit your time availability. Your partners can suck you dry, particularly if you are in a firm where you have a full or partial practice to attend in addition to your management role. Set your available time slots and let your partners know that when you are working for your clients you are off limits. LP

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