

Taking The Lead: Developing Intelligent Leaders: A Case Study

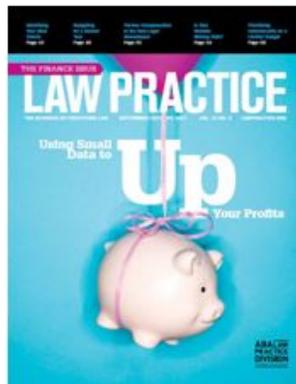
I RECENTLY CONCLUDED an eight-month leadership development program with a group of 15 partners of a global law firm, most of them in their 40s.

To participate, these partners had to apply to the firm's management committee, as this would be a significant investment of money and time into each of their careers. At the finale, I separated them into random small groups and provided each group with a situation. These hypotheticals were each unique and addressed situations that would likely present themselves to lawyers of this age and career stage.

One hypothetical involved succession, another addressed commoditization and the third involved the implementation of business intelligence. These groups of five members had 90 minutes to understand what was being asked of them, gather the facts, discuss, debate and make recommendations to their firm. To keep it real, the groups presented their analyses to their firm management committee—the very folks who had approved the investment in their leadership development.



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President



The analysis and presentation of each group were simply excellent, and the Baby Boomer law firm leaders were often fairly impressed. When introducing this exercise, I assured the group members that finding the right answer was not the most important factor; firm leaders were more interested in how they approached the situations. The exercise is not about focusing on what you know but, rather, how you think. As I share the approaches taken by two of the groups below, consider how the next generation of partners in your firm would approach these situations.

SITUATION 1: THE HUMAN SIDE OF BUSINESS INTELLIGENCE

The firm has invested in new business intelligence tools and resources. This new information will arm you with the ability to understand the drivers of profitability at the practice group, client and matter levels.

Implementing business intelligence will impact different members of the firm in different ways. More importantly, it will lead to change.

Firm leaders have asked you to identify the ways that you and your colleagues will be affected by this information. What are the issues, and how might you influence changes in the firm?

This group began by telling a story about the USS Carl Vinson, sharing details about its size and describing the remainder of the "fleet" with which it was associated. They went on to tell us of reports from the U.S. Department of Defense that this fleet was on its way to the North Korean peninsula until someone posted a photo online of the entire fleet heading to Australia to participate in NATO exercises. The story had enough detail to capture and engage the audience and to spark its curiosity.

The group members then tackled the challenge by sharing their assumptions about business intelligence—and the likely assumptions of their peers—regarding the nature and direction the firm might take with this newfound information. Then, and only then, did they focus on the upside of business intelligence: helping lawyers to challenge their

assumptions about the kinds of work and types of clients, identifying areas worthy of investment and recognizing the types of work that could be done profitably in new and different ways. It helps to get our attention with a story, gather our assumptions and then confront reality. The group spent most of its time on getting buy-in and managing the human side of change.

SITUATION 2: HOPE IS NOT A STRATEGY

For young partners, the effective transition of referral relationships, know-how and clients is critical to the long-term success of the firm. When younger partners can work effectively with older partners to retain the latter's clients, the older partners have a legacy, the younger partners have a runway and the firm itself has a future.

Many firms hope that older lawyers will handle this transition effectively and "do the right thing." On the other hand, older lawyers often feel that younger lawyers are hungry to "take their clients."

In many firms both hard barriers (e.g., structural, capabilities, resources and compensation) and soft barriers (e.g., behavioral, leadership, how people spend and value their time) get in the way of success(ion) planning.

How can success(ion) planning be different? Collaborating to get to the crux of the matter and presenting options that will get to win-win are paramount, thereby balancing the interests of older partners, younger partners and the firm itself.

How would younger partners in your firm approach this situation?

Our group first identified three goals articulating what needed to be done and also recognizing that the plan needed to be concrete. Whatever the approach, it needed to provide for equitable compensation distribution during the transition. Finally, the methodology needed to foster a culture of trust, teamwork and collaboration. These are undoubtedly lofty goals that current leaders in many firms have been attempting to tackle for years.

With clarity in terms of their goals, our bright young partners reflected on the current reality. They identified six observations on the state of succession in their firm, including the ad hoc nature of the process, the fact that it is too focused on partners at the end of their careers and that compensation created barriers.

With clearly articulated goals and their minds attuned to the current realities, they then focused on the gaps and identified solutions that could, with further effort, bridge those gaps.

A wise lawyer once told me that "succession requires a tremendous amount of generosity." That's true, but when I first heard that phrase I, like others, saw it through the lens of a senior person who is generous with work opportunities, client introductions and opportunities for the more junior persons to gain skills, profile and, indeed, a practice. Our group of thoughtful Generation X partners described a firm where generosity went in all directions: senior to junior, junior to senior and the team along with the client involved in the transition.

These partners see the benefit in making succession part of normal practice at all levels in the firm since professionals progress throughout their careers, and succession isn't simply a project for 60-somethings to fear. Our group could clearly see the long-term financial benefits to the firm and its members, the client service benefits of evolving the team for a client so its work is done at the right

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rate and, finally, the need to shift from rewarding individual contributions to rewarding a team.

CONCLUSION

Over nine months, six modules, a curated reading list and a few TED Talks, our group of partners was exposed to a wide range of information, discussion and challenges. They grew as individuals, they bonded as a team, and they have been exposed to different ways of thinking—ways you don't learn in law school.

Perhaps most important they told us they have learned to be more engaged as partners and are better followers. They all agreed that it's easy to critique current law firm leaders—after all, lawyers are trained critics—but armed with new ideas and new frameworks for thinking, and the opportunity to step away from the day to day, they now have a greater appreciation for those who are serving their firms in leadership roles and the challenges they face. What would you rather have, armchair critics or a generation of young partners who can both challenge and support you rather than take shots at you?



*Consider the **PLI Leadership Program 2017** to help your Firm build leadership bench-strength within the firm of skilled and knowledgeable candidates for succession of leadership roles in the firm.*

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