THE NATIONAL LAW REVIEW

Building a Business Development Mindset in Law Firm Associates, Junior and Income Partners

Thursday, March 3, 2016

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The National Law Review / The National Law Forum LLC

Law Office Management
All Federal

Firms continually struggle to transition associates and junior partners from the "learning to be a great attorney mindset" to being great attorneys who also actively contribute to the firm's bottom line. In a fragile and shrinking legal market, business development at all levels and in all practice areas starts earlier and is being monitored more closely. Common stumbling blocks at the outset of building a business development mindset include where attorneys should start and how firms should help attorneys tailor their plans to both their different practices and diverse personalities. Once those business development plans are in place, firms are further challenged by how they can monitor and measure the effectiveness of their plans and how they must balance competing requests for funding for Business Development activities.

I had the opportunity to interview three law firm leaders in diverse practice groups about developing and monitoring attorneys' business development plans. Jason P. Grunfeld, the Head of Business Development and a partner in the firm's Financial Services group at Kleinberg, Kaplan, Wolff & Cohen, P.C.; Louis Britt, the Regional Managing Partner for FordHarrison's Memphis, Nashville and Dallas offices and a Partner in the firm's Employment Litigation group; and Samir Gandhi, co-practice leader of Sidley Austin's New York Corporate Group, took the time to answer some questions about effective business development strategies. Thank you to for Messrs. Britt, Gandhi, and Grunfeld for sharing their experiences.

Jennifer: What are some practical tips for helping even the most junior associates build a business development mindset?

Jason: I tell associates to ask themselves some big questions:

- What part of my work/profession excites me?
- What is my network (professional, social, school), and how can I keep actively intouch with them?
- What are my priorities and where do I want to be in 2, 5, or 10 years?

Then I encourage them to draft a plan for developing their: skills; expertise; visibility within the profession and to potential clients; and expand their network (both internally and externally). To keep up the momentum, I ask them to pick two items they can complete within the next month. One goal might be to reconnect with a potential or current client by sending them an email to touch base. Another could be to research an organization they would like to become more involved in. Still another could be to think about a potential article topic in their area of practice.

I also remind them to look for everyday opportunities to connect with new contacts and reestablish old ones. This kind of networking is essential no matter what stage of your career you are in. It's not just about connecting with potential clients, it also gets you in front of referral sources, mentors/advocates, and ultimately a great support system.

Louis: At FordHarrison, we encourage associates from the very beginning to build a business development mindset. This starts with building good habits and getting out to meet people. We insist that associates take part in an organization, whether it's a bar association, an industry association, philanthropic, or civic-oriented. We want them to work toward becoming a leader in that organization, which can start with committee involvement and build from there. We want them to write for publications, participate in speaking opportunities, and get used to occasionally having lunch outside the office. They can start with former classmates, but also take the opportunity to buy a client lunch whenever they have the opportunity in working with them.

Building good habits is akin to regular exercise. No one can run a marathon without putting in lots of shorter runs on a daily basis. Lastly, it's always good when partners can take associates along on a business development activity, whether it's as simple as a lunch or as big as a pitch meeting. People learn best from examples, and this is a great way to take a little of the mystery and nervousness out of business development for associates.

Samir: Use simple, easy to accomplish tasks. Most junior associates/partners who are new to practice development get intimidated by the concepts of "business plans" or marketing strategies. Create goals that are effective yet not overwhelming, like doing one client alert per month or three practice development phone calls per week. These are less intimidating and more likely to be done and each sets a goal that is practice development-focused.

Jennifer: How can business development plans be tailored to meet different types of practices, different personality types?

Jason: For most lawyers, the two primary obstacles to business development are fear and lack of time. The fear comes when lawyers are asked to step outside of their comfort zones and engage in new activities. Lack of time causes lawyers to push business development to the back burner, never giving it the chance to mature into a habit.

As far as personalities go, we also know that lawyers score high on skepticism (they question everything), autonomy (they don't like being managed), and urgency (they want immediate results). None of this is great for developing business. At Kleinberg Kaplan we try to overcome these obstacles by helping our lawyers develop marketing plans and tactics that fit their practices and unique personalities.

Tactics such as writing articles and participating in webinars to demonstrate thought leadership are helpful for lawyers whose personalities are more introverted. Speaking to groups and attending networking functions are suggested for lawyers who are more comfortable with being extroverted. Some also find success with small group interaction at settings such as restaurants, cultural events, or sporting events. Other tactics can include making lawyers available for interviews to comment on key issues related to their area of practice. It's all about the comfort zone for the individual lawyer... there is no "one size fits all." Lawyers whose business development efforts are consistent with the needs of their practice, as well as their personality, values, and interpersonal characteristics are more likely to perform better.

Samir: Difficult to answer as it really depends on the practice, but I tell people to really listen to what their clients or prospective clients want. Lawyers tend to do things that are formulaic rather than bespoke. Listen to what your clients' needs are and your business plan can revolve around that need.

Jennifer: Once business development activities have taken place, how do you monitor follow up and follow through?

Jason: One aspect of our coaching program is the development of systems to organize, motivate and direct our lawyers' business development activities in the shortest amount of time. We are helping our lawyers to build their own specific list of prospects that they would like to transform into clients – and a system that tracks exactly where they are in the process and the next steps that need to be taken. This analytical approach provides organization, prompts action, tracks conversations, and helps us to analyze networks. The process begins with a chart that includes the name of the target organization; the potential contact within the organization; general description/information about the organization, history and notes about the contact; next steps to be taken; and deadlines to be met.

An important part of the process is identifying the various stages of the relationship:

1. target identified,
2. when the initial communication is made,
3. what steps are taken to build the relationship,

4. when the meeting is held to assess legal needs,
5. what steps are taken to build trust (follow-up, sending articles, sharing information, etc),
6. when the agreement is made to hire, and
7. when the file is opened.

Samir: At Sidley we try to gauge follow up through surveys and results inquiries (e.g., how did the RFP go?). As a practice group head, I try to make sure I remind lawyers on my team to continually follow up and keep your promises to do so.

Jennifer: How do you balance competing requests for funds / priorities for business development activities?

Louis: As attorneys are seeking approval for funds outside of routine client lunches or dinners, we ask them what business purpose is served and what follow-up is planned. Another thing we do at our firm is give a greater priority when a lawyer looks to involve others in his or her office. We want to avoid the use of funds for "pet projects," so to avoid this, we will often insist that certain activities involve more attorneys within the office, and require a plan for follow-up.

Samir: Carefully. Based on a combination of need and effective use of funds. We are a large firm and there are a lot of competing teams looking for funds. We try to make sure teams use best practices to be efficient so that we aren't unable to fund someone who is deserving because we were inefficient with funds.

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[1] I recently had the opportunity to hear Louis Britt III, Samir A. Gandhi, and Jason P. Grunfeld speak at Thomson Reuters 23rd Annual Marketing Partner Forum held last month in Orlando. I'd also like to extend a big thank you to Cindy Larson, the Publisher of SuperLawyers Magazine who moderated the "Where Are You Going? Where Have You Been? Investing in Junior & Income Partners for Business Development" panel whose members included Messrs. Britt, Gandhi, and Grunfeld. Click here: for a full recap of this panel discussion by Cindy.