

Lessons Learned From the Business Development Coach's Playbook

By Peter A. Johnson, Esq., Law Practice Consultants

What does it take to be a successful attorney in today's legal environment? For one thing, it takes a little help, which more and more often comes in the form of a business development coach.

Over time, perceptions of coaching programs have changed. Years ago, coaching was considered a last resort and reserved for those who were on their way out. Now, our coaching clients range from senior partners who want to keep their game sharp, to up-and-coming associates eager to prove their value to the firm.

In recent years, more firms have invested in business-development coaching, both internally and externally. Coaching is now more frequently viewed as a valued resource; a privilege and integral to an attorney's future success.

Working with attorneys in firms both large and small, we have identified what works, what can make coaching more effective, and the important steps a law firm and its attorneys can take to help ensure a return on their investment in business-development coaching.

Developing business requires behaviors and attitudes that do not come easily or naturally to most attorneys. Business development prowess, however, is now the *sine qua non* to success, firm advancement and control of one's future.

There is no substitute for honed legal skills and experience, but being an expert in one's practice no longer guarantees a book of business. Legal excellence is now assumed and is the minimum needed to "get you in the door."

In addition to consideration of legal acumen, clients' hiring (and retention) decisions are based in large part on the relationship skills that differentiate the good from great business developers — skills that are not taught in law schools.

Similar to an athlete preparing for an upcoming season — or one who wants to ensure a longer, more successful career — attorneys have turned to coaches for support in maximizing their potential.

Over the years, we have learned what is required to make a coaching relationship successful as well as common characteristics of those who have benefitted from coaching.

The following are trends and themes, which we are seeing:

- **Motivation and accountability are key.** Coaching is not intended to be "remedial." Most attorneys who are "pushed" into coaching by their firm but do not embrace the opportunity do not do well. We can't help those who don't want to be helped. Attorneys working with a coach must have a desire and commitment to succeed and be willing to experiment and to go outside their comfort zone. A coach's responsibility is to work with the attorneys to identify their unique challenges and to develop a personal plan to neutralize them.
- **Coaching is not for every attorney.** We cannot transform everyone into a superstar. Some attorneys, even with the best of intentions, are simply resistant to change. Others are unwilling to do the necessary work, and still others refuse to recognize the tidal shift in the legal industry. Attorneys and law firms need to be realistic about what results can be achieved.
- **Each coaching relationship is unique.** There is no one solution or plan that will work with every attorney, even those within the same law firm or practice area. A coach must be flexible and adapt to each client and the culture in which the attorney practices. Determining what makes each attorney "click" is the first step in establishing a successful coaching relationship.
- **Selection and research are key.** Rather than asking, "Who wants a coach?," firms should be selective in determining who may be best suited to participate. In larger firms, practice group leaders are involved in making

recommendations. In other firms, there is an application and interview process. Some firms require their coaching participants to sign contracts in which they “legally” commit to the program. Before the program begins, the coaches also need to conduct their own research. We have found a preliminary survey to be particularly helpful in learning an attorney’s business-development persona. The more we know about the coaching client before entering the coaching relationship, the greater the likelihood of success.

- **Management support is essential.** If firm leadership does not fully support the coaching initiative, the program may not succeed. The firm must provide both financial and moral support, along with patience necessary to see the results develop over time. (For more, see my article from the February 2014 issue of MLF, “Top-Down Business Development Influence,” <https://bit.ly/2sLNh8q>)
- **Think as an owner.** Becoming a business developer requires an attorney to shift his or her mindset from lawyer to business owner. Attorneys need to develop a proprietary interest in growing their individual practice and the firm’s business. Someone who has a strong sense of ownership does not focus solely on getting the work done, but also takes an interest in fully understanding how the business functions. It is not something you “do when you have some spare time” but a commitment you live every day.
- **Compensation must be aligned with business development.** People do that which is measured and for which they are rewarded. It is difficult to change behavior if you can’t affect compensation. If a firm wants to develop a business-development culture but continues to base compensation solely on billable hours, most attorneys will not spend time in developing business. A firm’s origination “credit” system also is a strong influence on business-development behaviors. In our experience, there is more collaboration and motivation in firms that have a compensation system where originations are shared. A seasoned coach will invest the time to learn about the firm’s compensation system.
- **Results take time.** Change takes time and effort. You can’t develop strong muscles with a single visit to the gym, and you can’t build a sustainable business-development mindset overnight. Developing and expanding business is more like a marathon than a sprint, and the watchwords are “patience and perseverance.” Managing firm and attorney expectations is a coach’s responsibility.
- **All roads lead somewhere, but you need a map.** Most attorneys talk about a business plan, but few actually have one. And, even fewer implement a plan, even if they have one. The plan should be tailored to the individual’s practice and personality, should be concise, and must address the following areas: existing clients, referral sources, internal marketing, prospects/ targets, “credentialing,” and networking. The plan should define long-term goals as well as identify short-term implementation activities. Timelines are integral to all plans.
- **Understand your ROI.** Although new business revenue (from existing clients, referrals, and new clients) is the ultimate goal of a coaching initiative, there are intermediate advances that need to be recognized and supported. Those advances may be evidenced by attitudinal changes with respect to business development, getting out more from behind the desk, approaching events more strategically, etc. Use the “But For” test. After three months of coaching, ask the attorney to finish the following, “But for the coaching, I wouldn’t have thought X, said Y, or done Z.”
- **Commit to a system of tracking effort and results.** The most successful lawyers capture their thoughts and ideas in a spreadsheet, chart or journal rather than keep it all in their heads or on sticky notes. They also develop the habit of regularly reviewing and updating their tracking system and sharing it with their coach or another colleague. Over time, tracking provides insight into which efforts are productive and which are inefficient and can be phased out.
- **Coaching may require a longer-term relationship.** A formal coaching program can be as short as three months or as long as two years — the length of time is dependent on the firm and particular needs of the attorney. Coaching may also continue long after a formal program is finished, and attorneys should be provided with such flexibility. Some attorneys request ongoing support and accountability to keep them on track. In these instances, assistance is often available within the firm via a business development manager, a buddy system, a peer group, or an interested office managing partner. A plan must remain in place to maintain momentum in business development.

When a coach and attorney are properly matched, results will follow. The right coaching relationship will result in attorneys thinking strategically about their roles within the firm, their interaction with other attorneys and their relationship with clients. One law firm partner told us: “I am thinking about my job differently” after several months of coaching

support. Another attorney views the role of her coach as “holding the space for me to think about how to grow my business and serve my clients better.”

In years past, not all law firms were convinced they needed to invest in coaching for their partners and associates. A sense of “go it alone” independence permeated the industry. Today, however, there is less resistance to change and much greater acceptance of outside assistance. The benefits of coaching can be multiplied and magnified across a law firm, making each attorney more focused and competitive in their business development endeavors.

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